

SENDING HARDCOPIES TO SECRETARY

Note: For those who can provide their own, just skip to step **number 3**. Just make sure you have no typo-errors or lackings in your documents to avoid mistakes and too much financial expenses.

1. Here is the list of the documents that are required for hard copies to send to our secretary.

- ACM FORM (if printed must also have fresh ink signs or else the ACM in Yellow ACM Booklet)
- CA FORM (LIFE & VUL) – with **HANDWRITTEN, DOC STAMPS, NOTARIZED, & A4 SIZE**
- COMPANY ID or CERT OF EMPLOYMENT (**printed**)
- ITR 2316 (LETTER WITH YOUR SIGNATURE IF NO ITR 2316) (**printed & must also have fresh ink sign**)
- NBI or POLICE CLEARANCE (**ORIGINAL COPY, JUST LEAVE THE PERSONAL COPY**)
- OR LICENSE PAYMENT (LOOK/READ FOR HOW TO PAY LICENSE GUIDE) (**printed**)
- 4 PCS. PHOTO ID 1X1 (**YELLOW BG**) (**HARDCOPY**)
- SLTC CERTIFICATE (**printed**)
- SSS E1 FORM (**printed**) or SCREENSHOT OF SSS MEMBER INFO (**printed**) at <https://member.sss.gov.ph/members/>
- SUN SELECT (if printed must also have fresh ink signs or else Sun Select inside Yellow ACM Booklet)
- SWORD DECLARATION B2 (LOOK/READ FOR SWORD DEC B2 GUIDE) – 3 COPIES (**HARDCOPY & A4 SIZE**)
- TIN ID or TIN NUMBER VERIFICATION (**printed**)
- TOP 100 (**printed or else the TOP 100 inside Yellow ACM Booklet**)
- TRAD & VUL CERTIFICATE (**printed**)
- IF YOU HAVE ONLY ALL TYPE OF APPROVALS (**then print it also**)
- IF YOU HAVE ONLY IC EXAM RESULT VUL & TRAD RESULT (**printed also**)

2. You have 2 (two) options for sending hardcopies

- *You are the one who will print your documents*
- *The secretary is the one who will print your documents but you have to pay for expenses*

3. Shipping the documents to secretary

Pin Location:

<https://maps.app.goo.gl/tbH19jhZNSiMkWy7>

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4. Note: It is recommended na makumpleto muna mga requirements nyo. Why? Dahil ipinapacheck pa ito sa mga heads ng Sun Life para maapproved. Once approved, ask the secretary for the copy of your files saka po i-print ang inyong files.

Bakit ko po ito inirecommend?

- Para mas accurate yung mga nakasulat sa files nyo dahil minsan may mga inedit ako pag may mali sa naisent nyo
- Para may reference kayo ng pagkokopyahan nyo especially sa mga form na handwritten for example SWORN DEC B2 & CA FORM

5. Ito po list ang pakitutukan ng maigi para maiwasan ang alin mang pagkakamali

- NBI (original copy) / yung personal copy wag napo
- CA FORM NA **NOTARIZED** & WITH DOC STAMP 4pcs [2 sa TRAD/2 sa VUL] (**handwritten po ito**), kapag inedit ng secretary yung CA nyo dahil sa may mali, please request a copy sa secretary para may reference po kayo ng paggagayahan.
- 3pcs SWORN DECLARATION B2 for new agent (**handwritten**), **PAKICHECK sa may 8%, (1 COPY NOTARIZED/DOC STAMPS & 2 COPIES NOT NOTARIZED/DOC STAMPS)**
- 1X1 photo ID yellow background, 4 pcs (kung nagpa-edit ka lang sa secretary ng Photo ID, request a copy of file then kayo na po magpadevelop)

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This guide was created by **Jayvee Bobis**

"Please read the guide carefully"

"Wag mahiyang magtanong pag may di naintindihan"

