

# Prosperity Card Purchase Form



The Sun Life Prosperity Funds, referred to as “Funds,” are all managed and distributed by Sun Life Asset Management Company, Inc. (SLAMCI), a member of the Sun Life Financial group of companies.

In this form, *you* and *your* refer to the buyer, while *we*, *us*, *our*, and the *Company* refer to SLAMCI.

**Purpose of the Form:**

This form allows you to purchase a Sun Life Prosperity Card. The Sun Life Prosperity Card is a stored value gift card that may be used to invest in peso-denominated Sun Life Prosperity Funds.

**IMPORTANT INFORMATION ABOUT PROCEDURES FOR PURCHASING A SUN LIFE PROSPERITY CARD:**

Any information provided in this form will be used to allow the Company to identify you and/or verify your information. This is to ensure that we protect you, your application, and your transactions with the Company from being used for money laundering and terrorist financing activities.

**IMPORTANT NOTES:**

You must accomplish and submit the completed form and present your valid ID to select Client Service Centers. For inquiries, please send an email to [sunlink@sunlife.com](mailto:sunlink@sunlife.com).

Please write legibly by using **capital letters**. Write N/A if question is not applicable. Mark the box(es) with an “X” to indicate your choice(s) then sign the form only when completely filled out.

A

General Information

1. Name of Buyer

Last Name

First Name

Middle Name

2. Permanent Home Address [No., Street, Village/Subdivision, Barangay, City/Municipality, Province/State, Country (P.O Box is not acceptable)]

3. Zip Code

4. Contact Number (country code, number, e.g. +639123456789)

+

5. Birthdate

Day

Month

Year

(e.g. 08-AUG-2008)

—

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6. Citizenship/Nationality

7. Birthplace (City/Province/State and Country)

8. E-mail Address

9. Name of Employer/Business

10. Nature of Work/Business

11. SSS No., GSIS No. or Philippine Tax Identification No. (TIN)

12. Source of Funds

Investments in other instruments (time deposits, etc.)

Inheritance

Income / bonus from employment

Matured pre-need plan / insurance policy

Proceeds from sale of assets (real estate, etc.)

Other sources, please specify:

B

Card Details

Denomination	Quantity	Total
Php 5,000		, .
Php 1,000		, .
Other:		, .
Other:		, .
Total		PHP , .

C

Compliance with the Anti-Money Laundering Act (AMLA)

Third Party/Beneficial Owner Determination

A third party/beneficial owner is a person or institution who funds the purchase of the buyer.

13. Is there any Third Party/Beneficial Owner, other than the buyer:

a) who funds the purchase

Yes

No

b) on whose behalf the purchase is being made

Yes

No

C	Compliance with the Anti-Money Laundering Act (continuation)

If there is a Third Party/Beneficial Owner, provide details below:

14. Name (Last, First, M.I.) / Business Name			15. Relationship to the Buyer		16. Occupation	
17. Permanent Address [No., Street, Village/Subdivision, Barangay, City/Municipality, Province/State, Country (P.O. Box is not acceptable)]						18. Zip Code
19. Birthdate (e.g. 08-AUG-2008) Day                      Month                      Year —                      —		20. Birthplace (City/Province/State and Country)		21. Philippine Tax Identification No. (TIN)  —                      —		
22. Type of Entity (e.g. corporation/partnership, etc.)		23. Nature of Business	24. Date of Incorporation (e.g. 08-AUG-2008) Day                      Month                      Year —                      —		25. Country of Incorporation	
26. Source of Funds						
Investments in other instruments (time deposits, etc.)			Inheritance			
Income / bonus from employment			Matured pre-need plan / insurance policy			
Proceeds from sale of assets (real estate, etc.)			Other sources, please specify:			

**D** Terms and Conditions

You understand that the value of the Prosperity Card shall be invested in select Funds subject to completion of requirements and to the approval of the Company.

The card owner shall be responsible for the Prosperity Card. Lost or stolen cards shall not be replaced, and the value of the cards will not be refunded by the Company.

You agree that SLAMCI shall process your personal data to: a) evaluate your application and administer your account; b) process transactions and enforce/fulfill contractual rights/obligations; c) improve the provision of products and services (including improvement in systems and business processes, data analytics, automated processing, etc.); d) comply with legal obligations, as well as laws and regulations (domestic or foreign); and e) manage risks and pursue its legitimate interests, including verification and obtaining additional personal data from third party sources. SLAMCI may disclose your personal data to its affiliates, service providers, and other third parties for processing consistent with the foregoing purposes, who shall be bound by contractual or other reasonable means to protect your personal data.

Your personal data shall be retained throughout the existence of your account(s) and/or upon the later of the expiration of the retention limit set by Company standards, laws and regulations, counted from account closure.

Your rights include the right to be informed, access your data, rectify errors, object to processing, and file a complaint. For more information about your rights and how we protect your data, you may access our privacy policy at <https://online.sunlife.com.ph/privacy>.

Should you have any concerns in relation to your rights or the processing of your personal data, you may get in touch with our Data Protection Officer at [privacyconcern@sunlife.com](mailto:privacyconcern@sunlife.com). You certify that you understand and agree with the declarations and authorizations above and SLAMCI's privacy policy at <https://online.sunlife.com.ph/privacy>

You agree to indemnify and hold free and harmless the Company, its officers, staff, agents and representatives free and harmless from any and all liability that may arise from any acts referred to above. Where a separate waiver is required to provide any information to competent authority or its delegate, you undertake to provide such waiver in a format acceptable to the Company. You confirm that the funds used to purchase the card are not in any way related to any illegal activity. You also authorize the Company to conduct a personal investigation and/or verification on you and any records or data you have provided with third parties, including government agencies. A copy of the authorization granted in this document shall be valid as the original.

27. Would you like to receive personalized communication and product offers from SLAMCI, Sun Life of Canada (Philippines), Inc. (SLOCPI), Sun Life Financial Plans, Inc. (SLFPI), and other members of the Sun Life Financial group that may help with your financial needs?

Yes                      No

<p><b>28. Printed Name and Signature of Buyer</b></p>  	<p><b>29. Date of Signing (e.g. 08-AUG-2008)</b></p> <div style="text-align: center; margin-top: -10px;"> <span style="margin-right: 20px;">Day</span> <span style="margin-right: 20px;">Month</span> <span>Year</span> </div> <div style="text-align: center; margin-top: 10px;"> <span style="margin-right: 20px;">—</span> <span>—</span> </div>
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For Office Use Only

30. Indicate the card numbers of the Prosperity Cards: