Advisor Home Office Overview

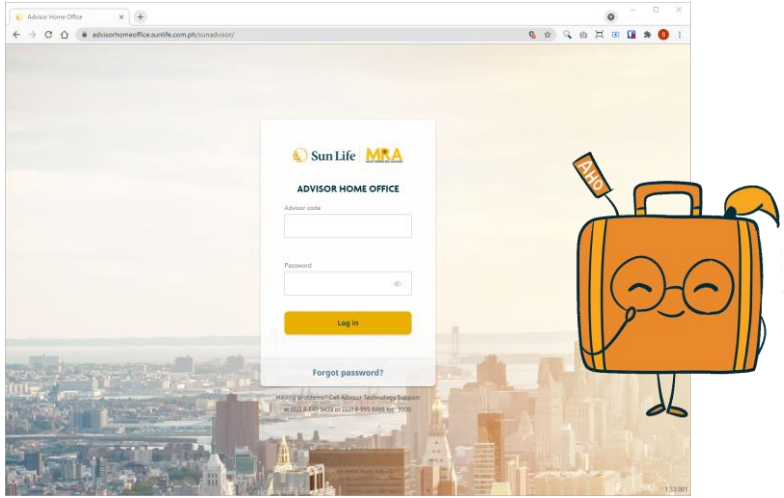
May 2021
Version 1.0

Sun Life

Life's brighter under the sun

Logging in to Advisor Home Office

- Access directly via https://advisorhomeoffice.sunlife.com.ph/sunadvisor/
- Use same login credentials as the other tools (Sun Advisor App, Sun Future Planner, SunSMART, BCOS)

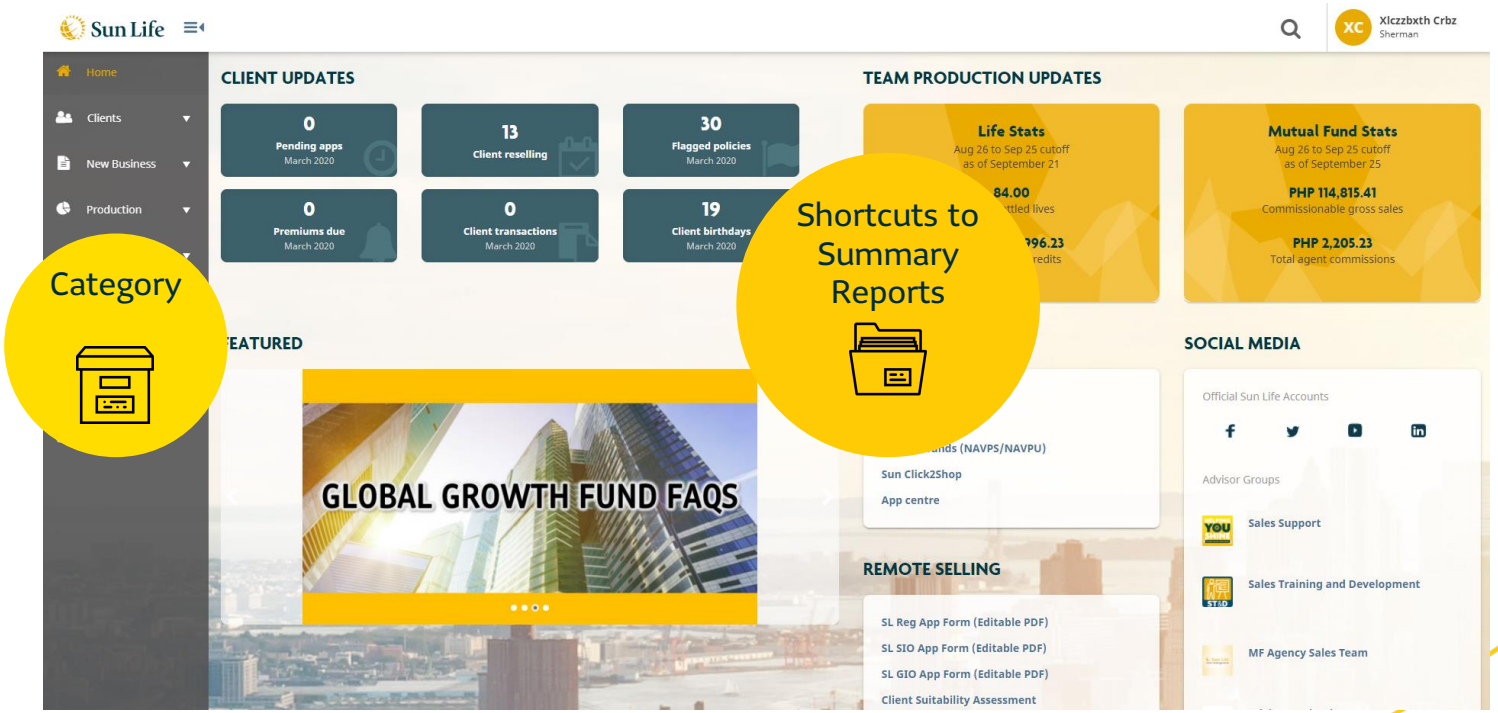


Getting to know the Navigation

Advisor Home Office is arranged differently from Advisors' Portal. To familiarize yourself, just remember that it works this way:

What about the Home Page?

The Home page is a springboard – shortcut to most used Summary Reports



Categories

Client servicing

- Clients
  - All clients
  - Client transactions
  - Premiums due
  - Flagged policies
  - Client reselling
  - Client birthdays

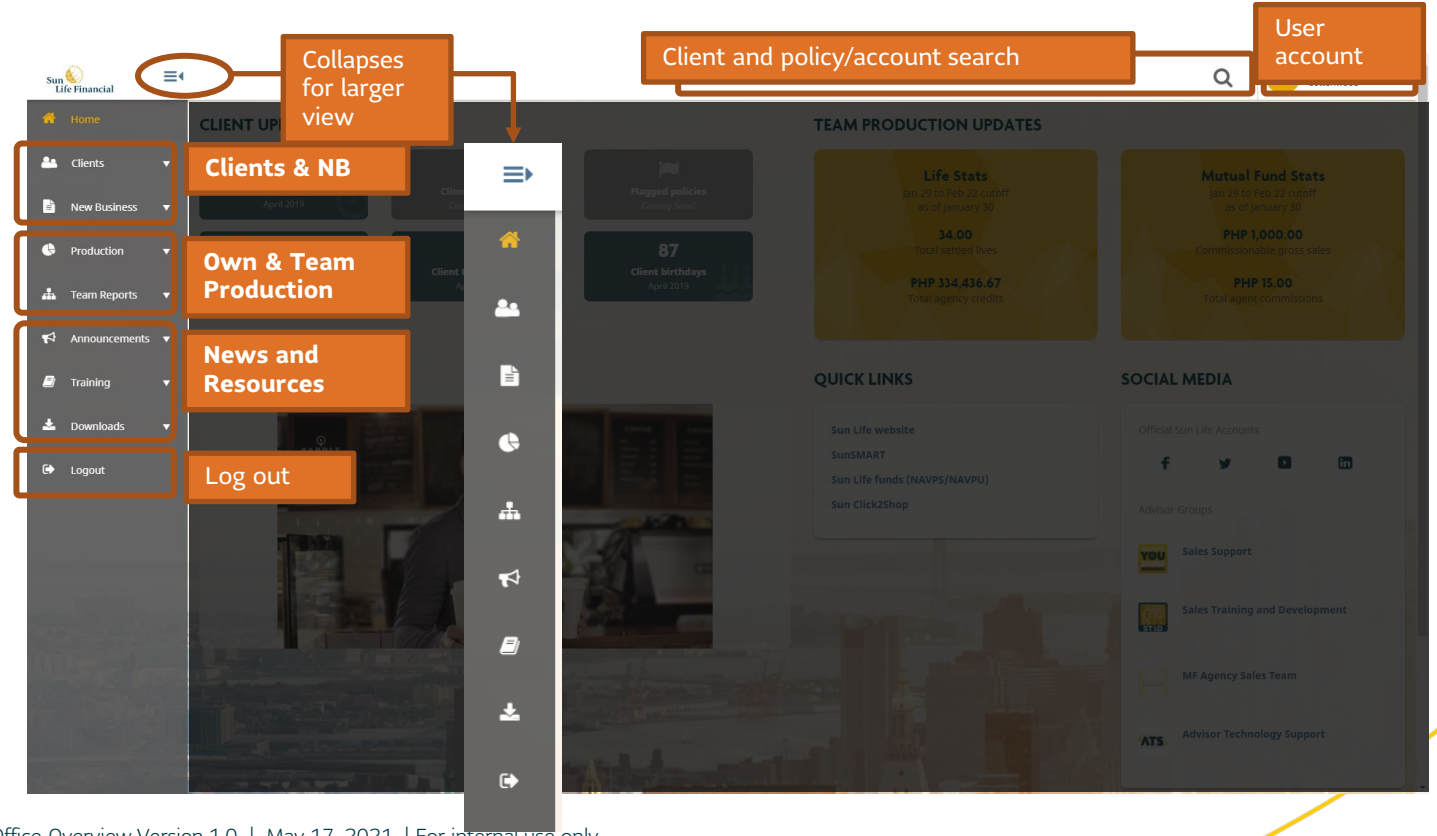
Production monitoring

- New Business
  - Personal
  - Team
- Production
  - Progress
  - Commission
- Team Reports
  - Production
  - Persistency

Downloads and Resources

- Announcements
  - News
- Training
  - Guides
- Downloads
  - SLOCPI
  - SLAMCI
  - App centre

How to use the Navigation



VIEWING CLIENT SERVICING LISTS

These help you look at clients based on the state of their policies

Category → Summary Reports → Detailed Report

CLIENTS → *All Clients*
Client Transactions
Premiums Due
Flagged Policies
Client Reselling
Birthdays → Details of the Client or Policy you selected

Available Client Servicing Reports

Which policies have opportunities?

All Clients	Client Transactions	Premiums Due	Flagged Policies	Client Reselling	Client Birthdays
1. Individual 2. Corporate	MF Transactions (Add/switch/ redeem)	1. Premiums Due 2. Plan Due	1. VUL with shortage 2. Overdue payments 3. Lapsed policies	1. Next best offer 2. Maturing policies	Client birthdays

Which clients had MF activity during this period?

Which policies are in danger of lapsing?

Clicking on any of the records here take you to the Detailed Policy Report

VUL with Shortage – VUL policies that are low on funds, which cannot cover for the premium

VUL WITH SHORTAGE

April 2021

Download

Client name / Contact number	Insured name	Policy	Policy status	Premium amount / Lapse start date	Shortage amount	Reactivate amount

No policies are flagged this month.

Overdue payments – list of clients who missed a Trad policy payment, but still within the grace period

OVERDUE PAYMENTS

May 2021

Download

Client name / Contact number	Insured name	Policy	Policy status	Payment mode	Premium amount / Due date
		Sun Smarter Life Elite Peso 10	Premium paying	Quarterly	PHP 51,522.55 May 3, 2021
		Sun Smarter Life Elite Peso 10	Premium paying	Quarterly	PHP 51,711.35 May 3, 2021
		Sun Premier	Premium paying	Quarterly	PHP 2,730.75 May 3, 2021
		Sun Fit And Well Advantage 10	Premium paying	Quarterly	PHP 9,556.26 May 4, 2021
		Sun Fit And Well Advantage 10	Premium paying	Yearly	PHP 139,760.00 May 8, 2021

Showing 5 of 7

Load 2 more

Lapsed Policies – list of clients with policies that have lapsed but still reinstatable

LAPSED POLICIES

as of May 10, 2021

May 2021

Download

Client name / Contact number	Policy	Issue date / Policy duration	Date lapsed	Reinstatement amount - as of today	Estimated reinstatement amount (+ 30 days)
[redacted]	Sun Maxilink Prime [redacted]	May 7, 2018 3 years	Mar 7, 2021 64 days lapsed	PHP 8,158.78 as of May 10, 2021	PHP 8,217.11 Jun 9, 2021
[redacted]	Sun Fit And Well Advantage 10 [redacted]	May 19, 2020 0 year	Feb 19, 2021 80 days lapsed	PHP 16,723.94 as of May 10, 2021	PHP 33,282.03 Jun 9, 2021
[redacted]	Sun Flexilink [redacted]	Apr 10, 2019 2 years	Feb 10, 2021 89 days lapsed	PHP 36,963.14 as of May 10, 2021	PHP 36,963.14 Jun 9, 2021
[redacted]	Sun Maxilink Prime [redacted]	Oct 3, 2017 3 years	Feb 3, 2021 96 days lapsed	PHP 6,842.39 as of May 10, 2021	PHP 6,911.88 Jun 9, 2021
[redacted]	Sun Fit And Well Advantage 15 [redacted]	Oct 27, 2020 0 year	Jan 27, 2021 103 days lapsed	PHP 54,868.24 as of May 10, 2021	PHP 55,312.16 Jun 9, 2021

Showing 5 of 37

Load 10 more

Downloading client activity reports

Available for downloads

- All Clients
- Premiums Due
- Flagged policies: VUL with Shortage
- Flagged policies: Overdue payments
- Flagged policies: Lapsed policies
- Client Reselling: Maturities
- Client Reselling: Next Best Offer

Report format:

- Password-protected Excel
- Password format is always Last name with first letter in uppercase + date of birth (MMDDYYYY) + last 4 digits of advisor code

Report range:

- Per month / depends on report

SEARCHING AND VIEWING A CLIENT

Just search the Client's Name or Policy Number to view their details.

Category

Summary Reports

Detailed Report

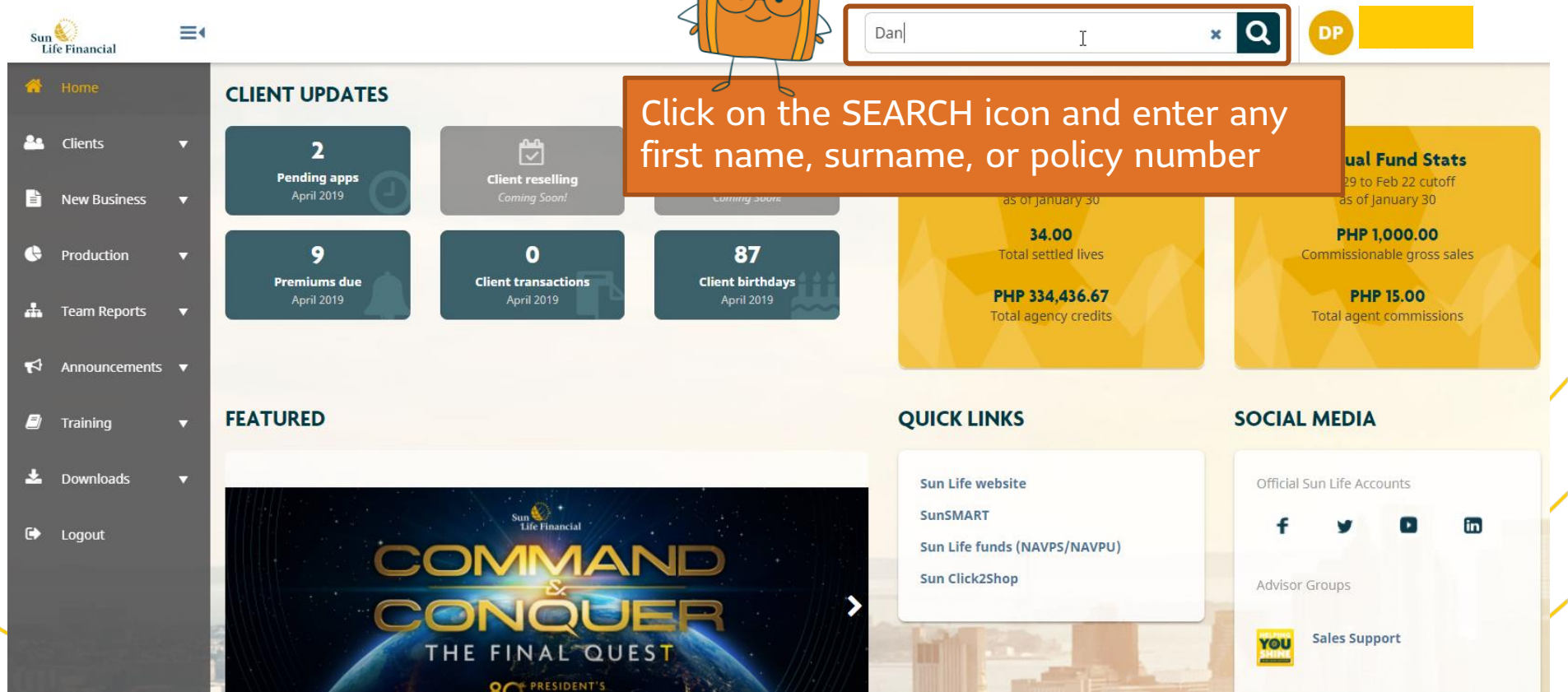
SEARCH

Search result list

Details of the Client/Policy you Selected from the search results

Let's practice!

Click on the SEARCH icon and enter any first name, surname, or policy number



santos

SL Sasha Advisor
Sun Life

Results found for **"santos"**:

289 in **Individual Clients**, 496 in **Individual Policies**, 0 in **Corporate Clients**

Clear search

INDIVIDUAL CLIENTS

as of Jan 15, 2021

Download

	Client name	Contact details	Location	Birthday
AS	Anna Santos	- CP/CONTACT/XXX/3000011670	San Rafael Bulacan	Nov 12, 1964 Age 56
AS	Angela Santos	xbnccx778@yzhvv.cvm CP/CONTACT/XXX/3000029911	Caloocan City Metro Manila	Dec 20, 1962 Age 58
AS	Andrew Santos	- -	Malolos Bulacan	May 27, 1968 Age 52
BS	Brian Santos	- CP/CONTACT/XXX/3000031992	Pulilan Bulacan	Nov 10, 1983 Age 37
BS	Bryan Santos	em/contact/xxx/3000036815 CP/CONTACT/XXX/3000036815	Malolos Bulacan	Nov 5, 1958 Age 62

Showing 5 of 28

Load 10 more

INDIVIDUAL POLICIES

Insured	Policy owner	Policy	Face amount	Issue date
Anna Santos	Anna Santos	Sun Maxilink Bright 0803539533	PHP 1,500,000.00	May 15, 2012
Danielle Santos	Anna Santos	Sun Flexilink1 0805003053	PHP 50,000.00	Sep 21, 2012
Michael Santos	Christina Delos Reyes	Sun Flexilink1 0805060162	PHP 25,000.00	Oct 10, 2012
David Mercado	Vincent Santos	Sun Flexilink1 0800897269	PHP 50,000.00	Mar 7, 2008
Paolo Santos	Paola Santos	Sun Premier 9511397	PHP 1,000,000.00	Oct 23, 1994

Showing 5 of 496

Load 10 more

Any match on the name keyword will be displayed, whether it is Owner or Insured, Individual or Corporate

Viewing client details

Clients › Ann Cherry Reyes › Portfolio

AC

Mrs Ann Cherry L Reyes

cherry.reyes@gmail.com 09177878277 Feb 9, 1990

Portfolio Profile

Portfolio shows clients' financial updates; Profile shows details about the client

Download as PDF | Email to client

Advisors can download the Portfolio as a PDF, and Email it to the client (soon)

TRADITIONAL

TRAD POLICIES

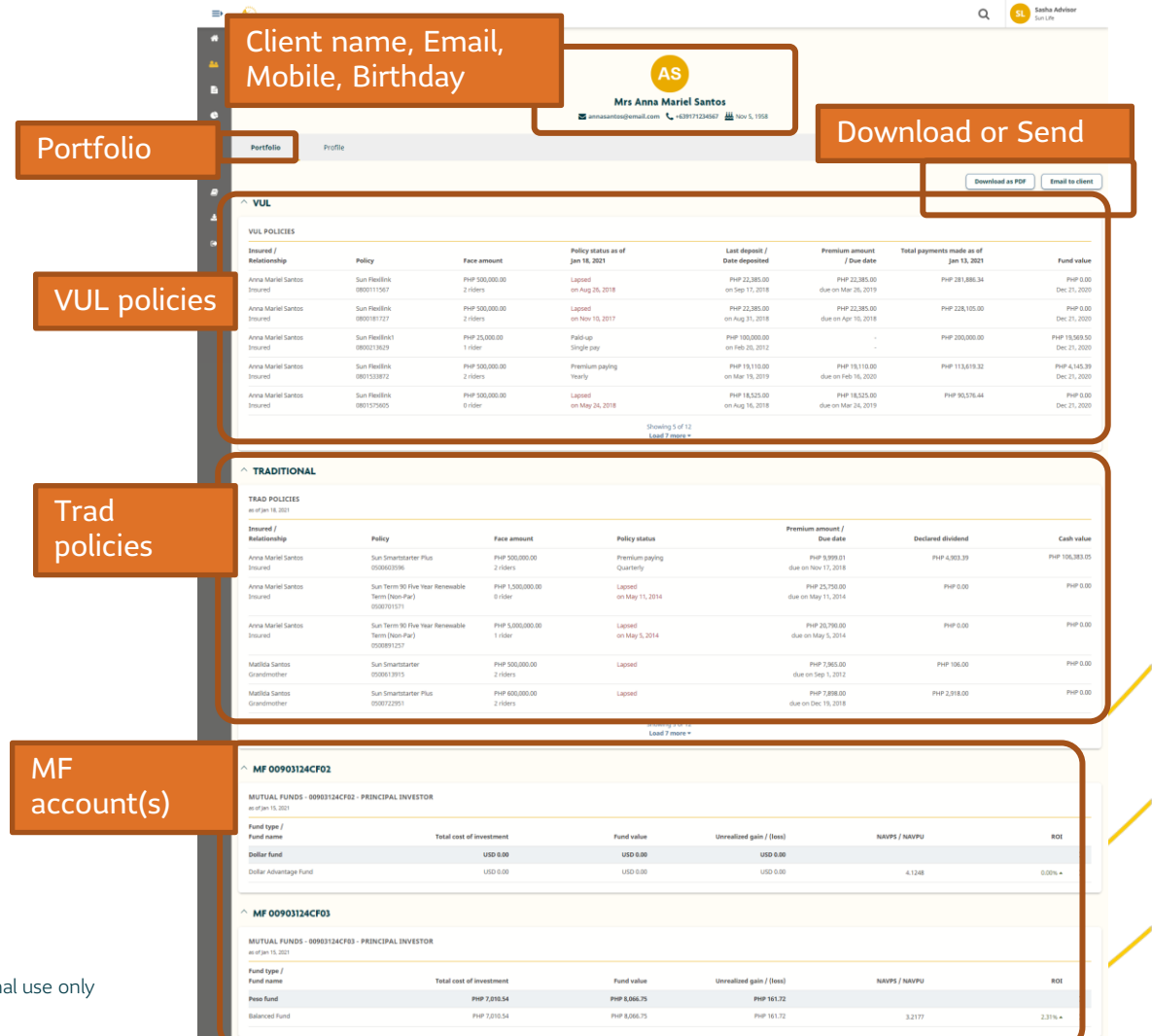
as of Jun 7, 2018

Insured / Relationship	Policy	Face amount	Policy status	Premium amount / Due date	Declared dividend	Cash value
Firstname/3000006035 Middlename/3000006035	Sun Permanent Life 9065917	PHP 300,000.00 2 riders	Premium paying Yearly	PHP 4,618.00 due on Oct 25, 2018	PHP 4,312.38	PHP 91,283.14

Client Portfolio

Contains the Client's financial details

- Client Portfolio is consolidated, shows SLOCPI & SLAMCI products
- Preneed plans not included
- Advisors will only see the products they have sold to the client



How to read the Client Portfolio list

Download as PDF | Email to client

VUL

VUL POLICIES

Standard policy details

Insured / Relationship	Policy	Face amount	Policy status as of Jan 18, 2021	Last deposit / Date deposited	Premium amount / Due date	Total payments made as of Jan 13, 2021	Fund value
Anna Mariel Santos Insured	Sun Flexilink 0800111567	PHP 500,000.00 2 riders	Lapsed on Aug 26, 2018	PHP 22,385.00 on Sep 17, 2018	PHP 22,385.00 due on Mar 26, 2019	PHP 281,886.34	PHP 0.00 Dec 21, 2020
Anna Mariel Santos Insured	Sun Flexilink 0800181727	PHP 500,000.00 2 riders	Lapsed on Nov 10, 2017	PHP 22,385.00 on Aug 31, 2018	PHP 22,385.00 due on Apr 10, 2018	PHP 228,105.00	PHP 0.00 Dec 21, 2020
Anna Mariel Santos Insured	Sun Flexilink1 0800213629	PHP 25,000.00 1 rider	Paid-up Single pay	PHP 100,000.00 on Feb 20, 2012	- -	PHP 200,000.00	PHP 19,569.50 Dec 21, 2020
Anna Mariel Santos Insured	Sun Flexilink 0801533872	PHP 500,000.00 2 riders	Premium paying Yearly	PHP 19,110.00 on Mar 19, 2019	PHP 19,110.00 due on Feb 16, 2020	PHP 113,619.32	PHP 4,145.39 Dec 21, 2020
Anna Mariel Santos Insured	Sun Flexilink 0801575605	PHP 500,000.00 0 rider	Lapsed on May 24, 2018	PHP 18,525.00 on Aug 16, 2018	PHP 18,525.00 due on Mar 24, 2019	PHP 90,576.44	PHP 0.00 Dec 21, 2020

Showing 5 of 12
Load 7 more

"How much?" details

If "Insured" is indicated, it means Insured is also the Owner. Otherwise, relationship will be indicated (e.g. Daughter)

only

Downloading the Client's Portfolio

Included:

Mr. Rafael Magalona Quinto
3 J. Teodoro St. Bet. 4th & 5th Avenue, Grace Park, Caloocan City

Sun Life Financial

Portfolio details as of March 4, 2020

Variable Universal Life Insurance

Insured name	Product	Policy status	Issued date	Face amount	Last payment	Premium due	Fund value
Rafa Magalona Quinto	Sun MaxiLink Prime 0812345678	Premium paying	Nov 12, 2010	PHP 1,000,000	PHP 12,000.00 paid May 23, 2018	PHP 12,000.00 due Oct 23, 2018	PHP 1,358.29
Mae Quinto	Sun FlexiLink Assist 0898765432	Premium paying	Oct 10, 2014	PHP 500,000	PHP 18,000.00 paid May 23, 2018	PHP 18,000.00 due Oct 23, 2018	PHP 13,936.91
Amanda Quinto	Sun MaxiLink Bright 089876123	Premium paying	Feb 14, 2011	PHP 500,000	PHP 15,000.00 paid May 23, 2018	PHP 15,000.00 due Oct 23, 2018	PHP 144,000.00

Traditional Insurance

Insured name	Product	Policy status	Issued date	Face amount	Last payment	Premium due	Cash value
Rafa Magalona Quinto	Sun Fit and Well Advantage 10 0812345678	Premium paying	Nov 12, 2010	PHP 1,000,000	PHP 12,000.00 paid May 23, 2018	PHP 12,000.00 due Oct 23, 2018	PHP 1,358.29
Mae Quinto	Sun Safer Life 0898765432	Premium paying	Oct 10, 2014	PHP 500,000	PHP 18,000.00 paid May 23, 2018	PHP 18,000.00 due Oct 23, 2018	PHP 13,936.91
Mae Quinto	Sun Safer Life 0898765432	Premium paying	Oct 10, 2014	PHP 500,000	PHP 18,000.00 paid May 23, 2018	PHP 18,000.00 due Oct 23, 2018	PHP 13,936.91
Rafa Magalona Quinto	Sun Fit and Well Advantage 10 0812345678	Premium paying	Nov 12, 2010	PHP 1,000,000	PHP 12,000.00 paid May 23, 2018	PHP 12,000.00 due Oct 23, 2018	PHP 1,358.29

Mutual Fund
Account 01234567CF01

Fund name	NAVPS	Shares	Fund value	Total cost of investment	Total redemption value	Unrealized gain/(loss)	Return on investment
Equity Fund	4.0889 as of June 14, 2018	53,441	PHP 218, 514.98	PHP 226, 755.53	(PHP 27, 000.00)	(PHP 8,240.55)	-7.00%
Bond Fund	2.7422 as of June 14, 2018	31,306	PHP 87,847.31	PHP 100,080.53	(PHP 3,000.00)	(PHP 3,903.35)	-3.90%
	Current value	84,747	PHP 88,580.29				

Report format:

- Password-protected PDF
- Standard client password: 01Jan1990D (Date of Birth (DDMonYYYY) + Last Name Initial (in uppercase).)

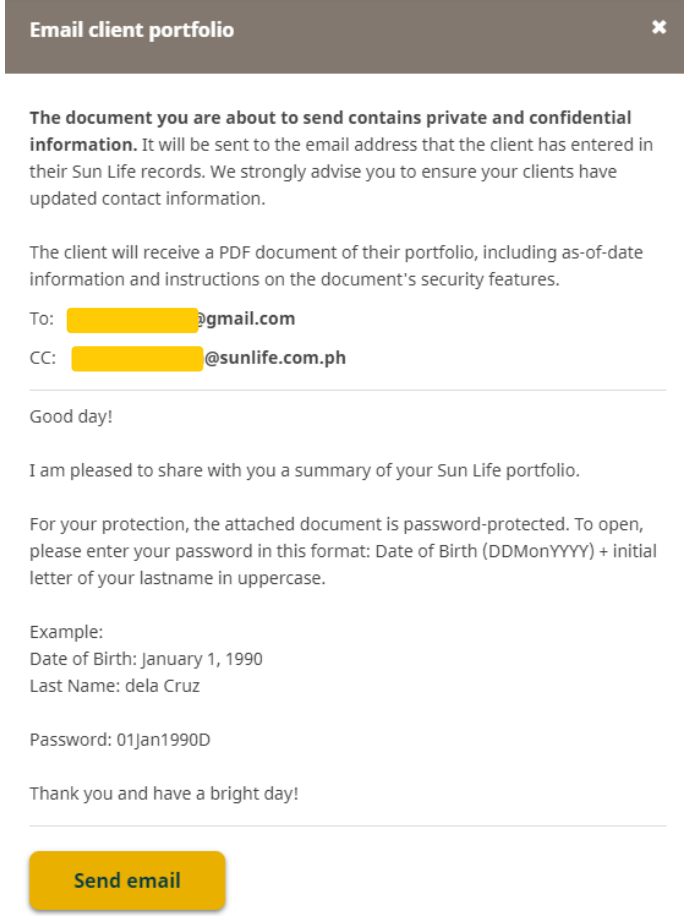
Report range:

As of date generated

Emailing the Client Portfolio

Click the “Email to Client” button on the Portfolio view to email a PDF version of the portfolio directly to you and the client. This saves you time from downloading it and composing the email for the client.

Note: Client needs to activate their My Sun Life Client Portal for this feature to be enabled. When they are active in My Sun Life, they can easily update their email address there, making sure you always send to the correct email address.



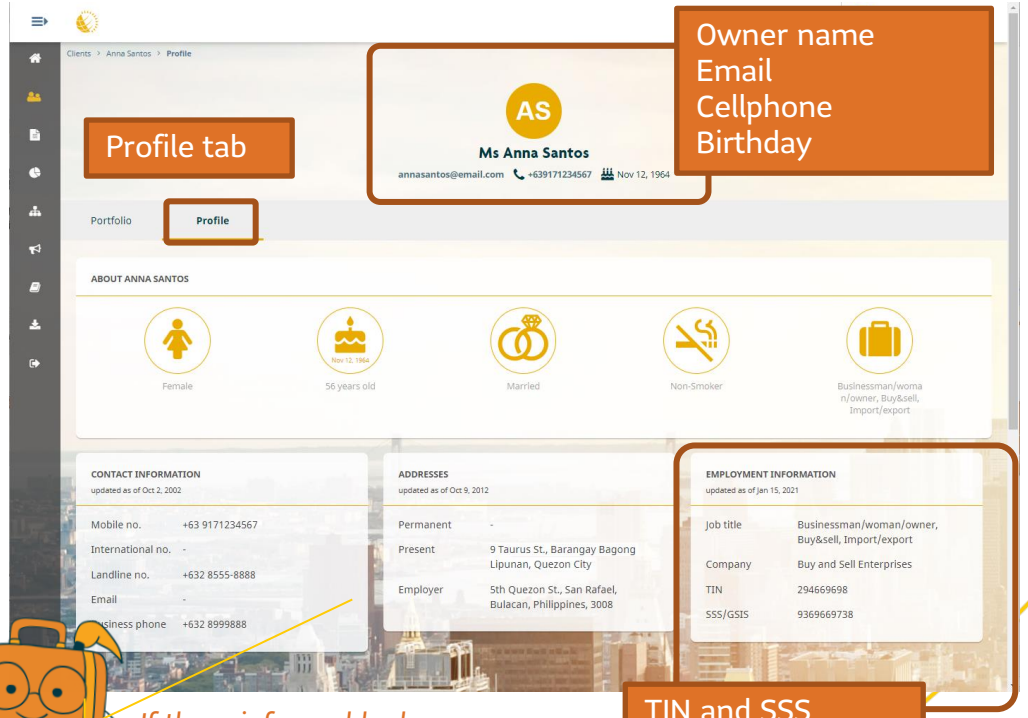
Client Profile

Contains personal and non-financial details of the client

- Demographic info
- Relationship with Sun Life
- Contact information
- Addresses
- Employment information

Notes:

- When client details are blank, it means clients should update their contact info with Sun Life.
- Client profile is based on Client Number.
- When a client updates their contact/personal info via a new policy, regardless if same or different advisor, the Client Profile data will be updated.



If these info are blank, encourage client to update their info with Sun Life via Client App

VIEWING POLICY DETAILS

You can access this from the Client Portfolio, or one of the Summary Reports

Route 1: CLIENTS → *All Clients List* →

Route 2: SEARCH → *Search Results* → *Client Portfolio* → Details of the Policy you Selected

Route 3: CLIENTS → *Client Servicing List (e.g. Prem Due)* → Details of the Policy you Selected

Accessing a policy from the Client Portfolio

Download as PDF | Email to client

VUL

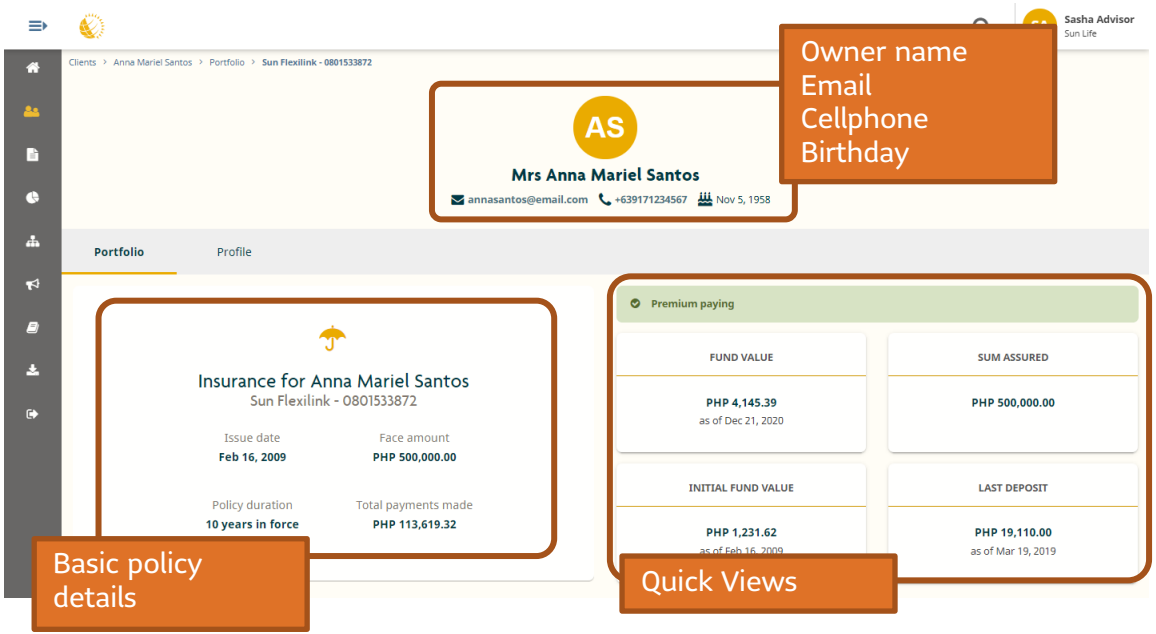
VUL POLICIES

Insured / Relationship	Policy	Face amount	Policy status as of Jan 18, 2021	Last deposit / Date deposited	Premium amount / Due date	Total payments made as of Jan 13, 2021	Fund value
Anna Mariel Santos Insured	Sun Flexilink 0800111567	PHP 500,000.00 2 riders	Lapsed on Aug 26, 2018	PHP 22,385.00 on Sep 17, 2018	PHP 22,385.00 due on Mar 26, 2019	PHP 281,886.34	PHP 0.00 Dec 21, 2020
Anna Mariel Santos Insured	Sun Flexilink 0800181727	PHP 500,000.00 2 riders	Lapsed on Nov 10, 2017	PHP 22,385.00 on Aug 31,	PHP 22,385.00	PHP 228,105.00	PHP 0.00 Dec 21, 2020
Anna Mariel Santos Insured	Sun Flexilink1 0800213629	PHP 25,000.00 1 rider	Paid-up Single pay	PHP 100,0 on Feb 20,	P 200,000.00		PHP 19,569.50 Dec 21, 2020
Anna Mariel Santos Insured	Sun Flexilink 0801533872	PHP 500,000.00 2 riders	Premium paying Yearly	PHP 19,110.00 on Mar 19, 2019	PHP 19,110.00 due on Feb 16, 2020	PHP 113,619.32	PHP 4,145.39 Dec 21, 2020
Anna Mariel Santos Insured	Sun Flexilink 0801575605	PHP 500,000.00 0 rider	Lapsed on May 24, 2018	PHP 18,525.00 on Aug 16, 2018	PHP 18,525.00 due on Mar 24, 2019	PHP 90,576.44	PHP 0.00 Dec 21, 2020

Showing 5 of 12
Load 7 more

Clicking a policy record to view more detail

Anatomy of a Policy View



Policy view sections:

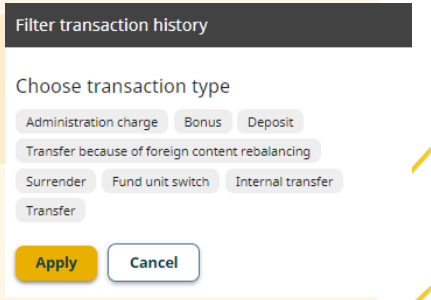
1. Owner Info
2. Basic Info
3. Quick Views
4. Billing Information
5. Policy (Trad) / Fund (VUL) Value
6. Policy declarations
7. Policy activity (VUL only)

Anatomy of a Policy View (Part 1)

	Trad	**VUL**
Owner Info	• Owner name • Email • Mobile • Birthday	*Same as Trad*
Basic Info	• Insured • Policy name & number • Issue date • Face amount • Policy duration	• Insured name • Policy name & number • Issue date • Face amount • Policy duration • **Total payments made**
Quick Views	• Policy status • Cash value • Cash surrender value • Declared dividend • Accumulated endowment	• Policy status • Fund value • Sum assured • Initial fund value • Last deposit

Anatomy of a Policy View (Part 2)

	Trad	VUL
Billing Information	• Premiums due • Billing details • Billing address	*Same as Trad*
Policy / Fund Value	• Dividend information • Policy advance information • Disbursement information	• **Fund allocation & value**
Policy declarations	• Supplemental benefits • Beneficiary • Insured information	*Same as Trad*
Policy activity		**Transaction history** can be filtered according to Transaction Type No limit in transactions; Will show all transactions since policy issuance



Lapsed Policy

Insurance for Anna Santos
Sun Flexilink - 0801575605

Issue date	Face amount
Mar 24, 2009	**PHP 500,000.00**

Policy duration	Total payments made
9 years in force	**PHP 90,576.44**

Enter date of reinstatement MM/DD/YYYY Calculate

Lapsed on May 24, 2018

This policy has lapsed due to non-payment of premium. You may use the calculator below to see how much is needed to reinstate this policy.

However, for lapsed policies beyond the reinstatable period, please get in touch with Client Care.

Email: sunlink@sunlife.com
Within Metro Manila: (02) 8-849 9888
Outside Metro Manila: 1-800-10-SUNLIFE (7865433)

SIMPLE REINSTATEMENT COMPUTATION

REINSTATEMENT AMOUNT	REINSTATEMENT DATE
PHP 19,278.09	**Feb 10, 2021**

- The computation contained herein is valid only if availed on or before the reinstatement as-of-date as contained above.
- The computation above is subject to our final confimation upon receipt of a valid application for reinstatement.
  Term plans and ETI/RPU policies with loan are excluded from this calculator

COMPUTATION DETAILS

POLICY DETAILS	
Payment mode	**Yearly**
Paid-to-date	**May 24, 2018**
Modal premium	**PHP 18,525.00**
Total annual regular premium	**PHP 18,525.00**
Total excess premium	**PHP 1.44**
Total partial withdrawals	**PHP 1,234.51**

REINSTATEMENT COMPUTATION	
Reinstatement date	**Feb 10, 2021**
Total periodic charges	**PHP 0.00**
Least reinstatement amount	**PHP 19,278.09**
COI (Current month)	**PHP 633.77**

Legal | Privacy | Security | Terms and Conditions

Access to this system is provided by Sun Life Financial solely for authorized business. Penalties may be enforced for unauthorized use, reproduction or distribution of this system, or any portion of it. By logging in, you are signifying your consent to these conditions and may be monitored for regulatory reasons.

How to find Lapsed Policies:

1. Clients > Flagged Policies > Lapsed Policies
2. Client Portfolio – policies with “Lapsed” status

Visibility rules:
When are these details available?

Policy Status	Icon Mapping
1 - Premium Paying	Premium paying
2 - Waiver	Premium waived
3 - Paid-Up Life	Paid-up
4 - Paid-Up Annuity/Extended Term	Paid-up annuity
	Extended Term Insurance

Policy Status	Icon Mapping
Lapsed	**Lapsed on Aug 4, 2013** This policy has lapsed due to missed premium payments. Reinstatement calculator will be available soon. In the meantime, please get in touch with Client Care. Email: sunlink@sunlife.com Within Metro Manila: (02) 849-9888 Outside Metro Manila: 1-800-10-SUNLIFE (7865433)

Policy Status	Icon Mapping
D - Death	Death
E - Surrendered	Surrendered
H - Expired	Expired
X - Converted	Converted
F - Matured	Matured

VIEWING MF DETAILS

You can access this from the Client Portfolio, or one of the Summary Reports

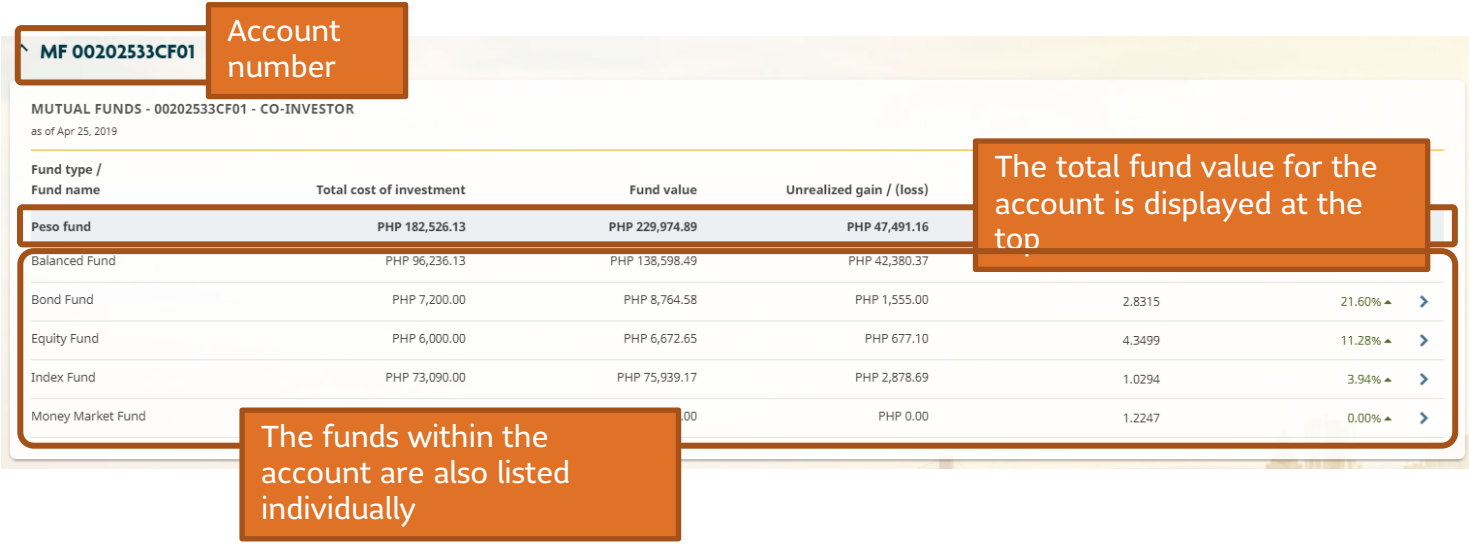
Category → Summary Reports → Detailed Report

Route 1: CLIENTS → *All Clients List* →

Route 2: SEARCH → *Search Results* →

Client Portfolio → Details of the MF you Selected

Client MF accounts – Summary



Fund type / Fund name	Total cost of investment	Fund value	Unrealized gain / (loss)		
Peso fund	**PHP 182,526.13**	**PHP 229,974.89**	**PHP 47,491.16**		
Balanced Fund	PHP 96,236.13	PHP 138,598.49	PHP 42,380.37		
Bond Fund	PHP 7,200.00	PHP 8,764.58	PHP 1,555.00	2.8315	21.60%
Equity Fund	PHP 6,000.00	PHP 6,672.65	PHP 677.10	4.3499	11.28%
Index Fund	PHP 73,090.00	PHP 75,939.17	PHP 2,878.69	1.0294	3.94%
Money Market Fund		.00	PHP 0.00	1.2247	0.00%

Each account is displayed in one card

- If the client has multiple accounts, it will be displayed one card
- The funds within the accounts are listed within the card
- Total fund value and individual fund values are displayed

Client MF accounts – Summary

If an account has both peso funds and dollar funds, 2 cards will be shown under one account umbrella.

Client MF accounts – Summary

MF 00202533CF01

MUTUAL FUNDS - 00202533CF01 - CO-INVESTOR

as of Apr 25, 2019

Fund type / Fund name	Total cost of investment	Fund value	Unrealized gain / (loss)		ROI
Peso fund	**PHP 182,526.13**	**PHP 229,974.89**	**PHP 47,491.16**		
Balanced Fund	PHP 96,236.13	PHP 138,598.49	PHP 42,380.37		44.04%
Bond Fund	PHP 7,200.00	PHP 8,764.58	PHP 1,555.00	2.8315	21.60%
Equity Fund	PHP 6,000.00	PHP 6,672.65	PHP 677.10	4.3499	11.28%
Index Fund	PHP 73,090.00	PHP 75,939.17	PHP 2,878.69	1.0294	3.94%
Money Market Fund	PHP 0.00	PHP 0.00	PHP 0.00	1.2247	0.00%

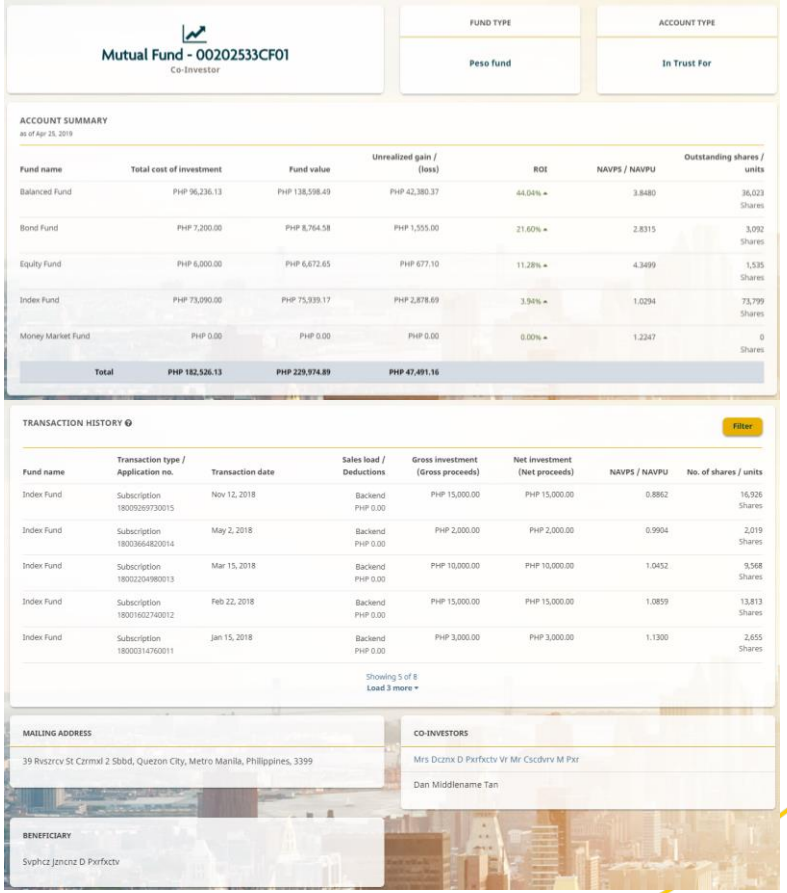
Account number

Each account is displayed in one card

- If the client has multiple accounts, it will be displayed one card
- The funds within the accounts are listed within the card
- Total fund value and individual fund values are displayed

MF accounts – Detail

- Overview
  - Account number
  - Fund type
  - Account type
- Account summary
  - Fund name
  - Total COI
  - Fund value
  - Unrealized gain / (loss)
  - ROI
  - NAVPS / NAVPU
  - Outstanding shares / units
- Transaction history
  - Filters
  - Up to two years of transactions only
- Other details
  - Mailing address
  - Co-investors
  - Beneficiary (In Trust For)



Mutual Fund - 00202533CF01
Co-Investor

FUND TYPE	ACCOUNT TYPE
Peso fund	In Trust For

ACCOUNT SUMMARY
as of Apr 25, 2019

Fund name	Total cost of investment	Fund value	Unrealized gain / (loss)	ROI	NAVPS / NAVPU	Outstanding shares / units
Balanced Fund	PHP 96,236.13	PHP 138,598.49	PHP 42,380.37	44.04% ▲	3.8480	36,023 Shares
Bond Fund	PHP 7,200.00	PHP 8,764.58	PHP 1,555.00	21.60% ▲	2.8315	3,092 Shares
Equity Fund	PHP 6,000.00	PHP 6,672.65	PHP 677.10	11.28% ▲	4.3499	1,535 Shares
Index Fund	PHP 73,090.00	PHP 75,939.17	PHP 2,878.69	3.94% ▲	1.0294	73,799 Shares
Money Market Fund	PHP 0.00	PHP 0.00	PHP 0.00	0.00% ▲	1.2247	0 Shares
Total	PHP 182,526.13	PHP 229,974.89	PHP 47,491.16			

TRANSACTION HISTORY
Filter

Fund name	Transaction type / Application no.	Transaction date	Sales load / Deductions	Gross investment (Gross proceeds)	Net investment (Net proceeds)	NAVPS / NAVPU	No. of shares / units
Index Fund	Subscription 180092697300 15	Nov 12, 2018	Backend PHP 0.00	PHP 15,000.00	PHP 15,000.00	0.8862	16,926 Shares
Index Fund	Subscription 180036648200 14	May 2, 2018	Backend PHP 0.00	PHP 2,000.00	PHP 2,000.00	0.9904	2,019 Shares
Index Fund	Subscription 180022049800 13	Mar 15, 2018	Backend PHP 0.00	PHP 10,000.00	PHP 10,000.00	1.0452	9,568 Shares
Index Fund	Subscription 180016027400 12	Feb 22, 2018	Backend PHP 0.00	PHP 15,000.00	PHP 15,000.00	1.0859	13,813 Shares
Index Fund	Subscription 180003147600 11	Jan 15, 2018	Backend PHP 0.00	PHP 3,000.00	PHP 3,000.00	1.1300	2,655 Shares

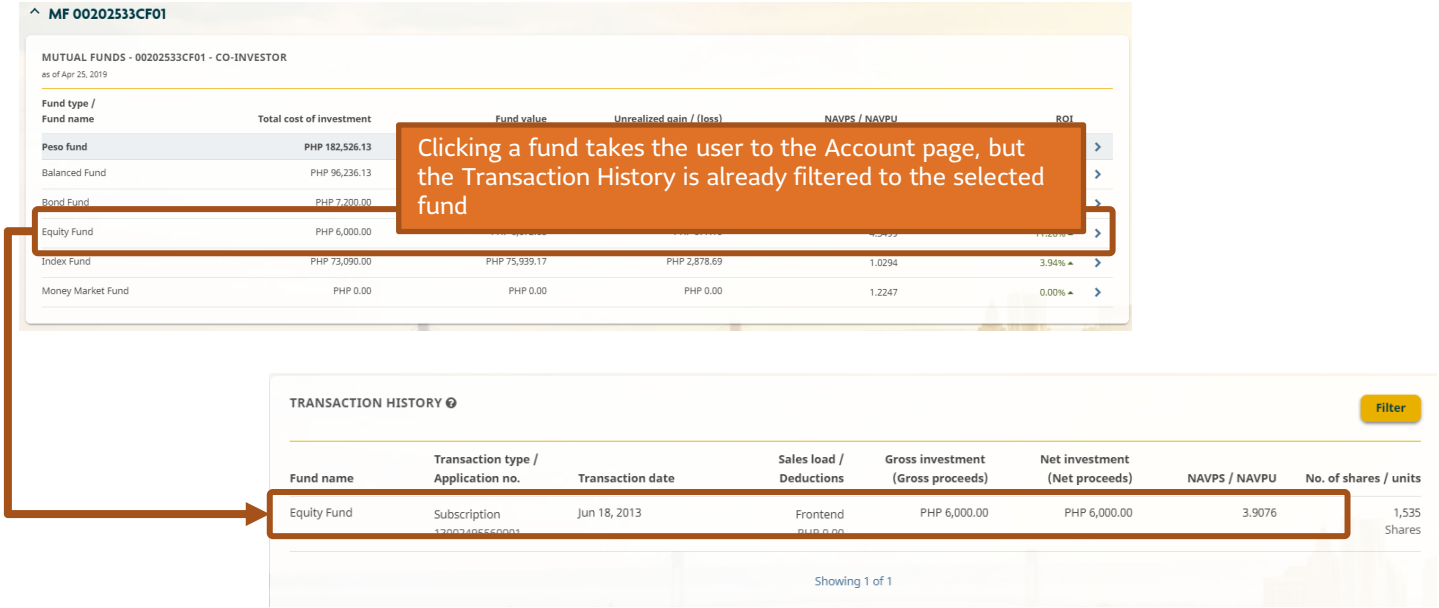
Showing 5 of 8
Load 3 more

MAILING ADDRESS
39 Rvszrcv St Czrmxl 2 Sbbd, Quezon City, Metro Manila, Philippines, 3399

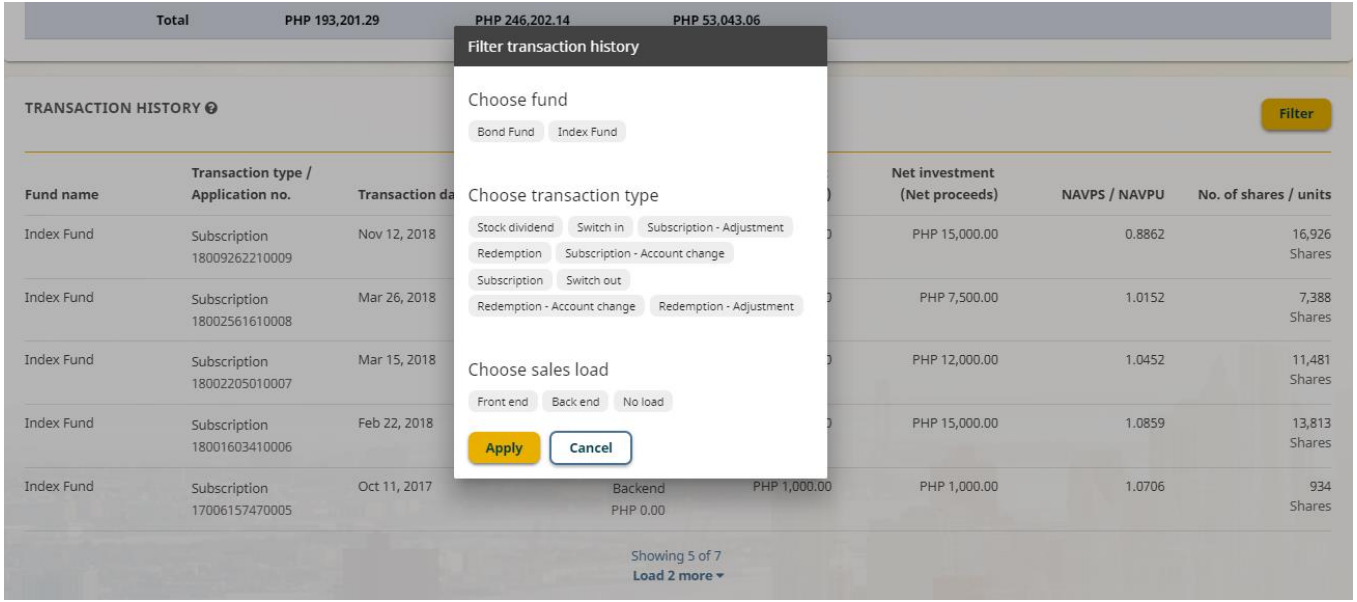
CO-INVESTORS
Mrs Dcznx D Pxrfxctv Vr Mr Cscdvrv M Pxr
Dan Middlename Tan

BENEFICIARY
Svphcz Jzncnz D Pxrfxctv

MF Account Features – Fund navigation*



MF Account Features – Transaction History filter



Transaction history displays 2 years worth of transactions

If advisors can't find a transaction:

- Check if the filter is turned on
- Check if transactions are more than 2 years ago

MF Account Features – Transaction History filter*

TRANSACTION HISTORY

Remove Filter

Showing: Redemption x Front end x

Filter is turned on
Multiple filters are allowed

Fund name	Trans Applic		s load / luctions	Gross investment (Gross proceeds)	Net investment (Net proceeds)	NAVPS / NAVPU	No. of shares / units
Equity Fund	Redemption 10006305240006	Jul 29, 2013	Frontend PHP 0.00	(PHP 1,717.16)	(PHP 1,717.16)	3.9475	435 Shares
Equity Fund	Redemption 10006305250007	Jul 29, 2013	Frontend PHP 0.00	(PHP 7,756.84)	(PHP 7,756.84)	3.9475	1,965 Shares
Equity Fund	Redemption 10006305260008	Jul 29, 2013	Frontend PHP 0.00	(PHP 1,488.21)	(PHP 1,488.21)	3.9475	377 Shares
Equity Fund	Redemption 10006704720009	Jul 29, 2013	Frontend PHP 0.00	(PHP 14,041.26)	(PHP 14,041.26)	3.9475	3,557 Shares
Equity Fund	Redemption 10006305210003	Oct 20, 2011	Frontend PHP 0.00	(PHP 6,205.63)	(PHP 6,205.63)	2.6107	2,377 Shares

Showing 5 of 11
Load 6 more

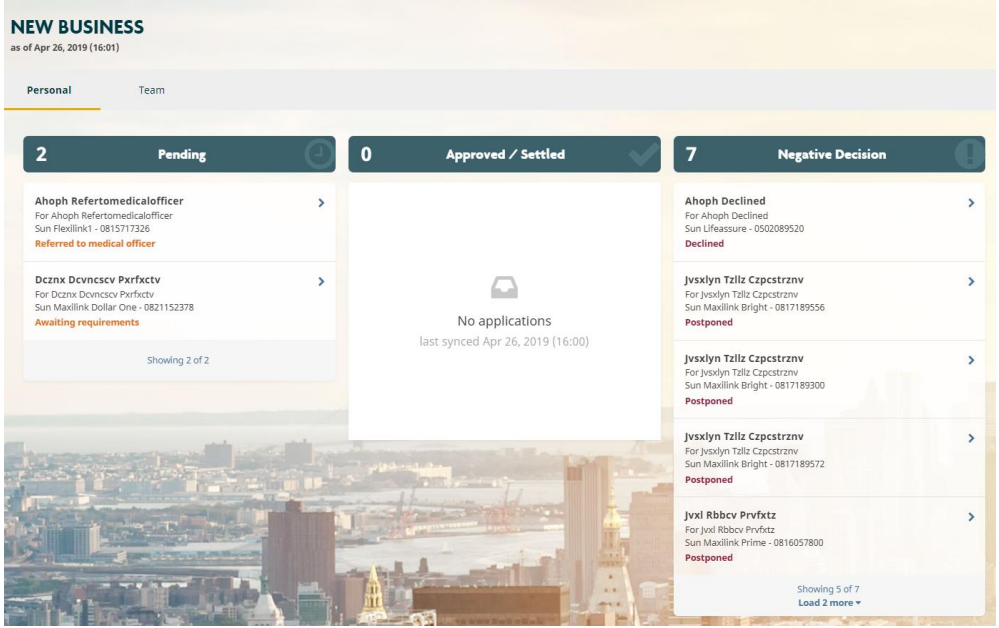
TRACKING NEW BUSINESS APPS

After you've submitted your app, go here to see the status

Category → Summary Reports → Detailed Report

NEW BUSINESS → *Pending Approved/Settled Negative Decision* → Details of the NB App you Selected

New Business status



New Business statuses are grouped into 3 sections: Pending, Approved/Settled, Negative Decision

- Data batch run is done every 2 hours during business hours
- It could be that the status of the app has changed in WMS in real time, but is still queued for the next batch for AHO (so the updated status will appear in the next batch job)

New Business Detail

New Business > Jvsxlyn Tzllz Czpcstrznv

JC

Mrs Jvsxlyn Tzllz Czpcstrznv

Application status

Postponed
Last synced on Apr 26, 2019 (16:00)

Policy application for Jvsxlyn Czpcstrznv
Sun Maxilink Bright
0817189556

FACE AMOUNT	APP SCAN DATE
PHP 900,000.00	Dec 29, 2017 Application no. SR00102619

UNDERWRITING INFORMATION

Underwriting remarks

U/writing decision Jan 8, 2018

Regret to inform you that we are postponing this application in view of client's medical history, Aug 25, 2015 5 organs ultrasound and Sept 03, 2015 breast ultrasound findings suggestive of abnormality. We may review only with the ff requirements all at no cost to Sun Life: - Nephrologist and Gastroenterologist clearance regarding the Aug 2015 ultrasound findings. - OB-Gynecologist clearance ruling out malignancy to include current mammogram and breast ultrasound. - Cardio Clearance to include current stress echo For your advance information, file will now be forwarded to our facilitator for further handling. For concerns/questions regarding refund, reimbursement and receipt of requirements, pls send to Phil_USD_Facilitators@sunlife.com.

Due date: -

Awtg branch rqmt We will await decision on applicant's simultaneous own life application. Please await further advice. Jan 5, 2018

Downloading NB app status report

Included:

- Status Category
- Application Status
- Policy no.
- Client no.
- Owner
- Insured
- Pending requirements
- Remarks
- Application no.
- Scan date
- AKCRA Scan Date

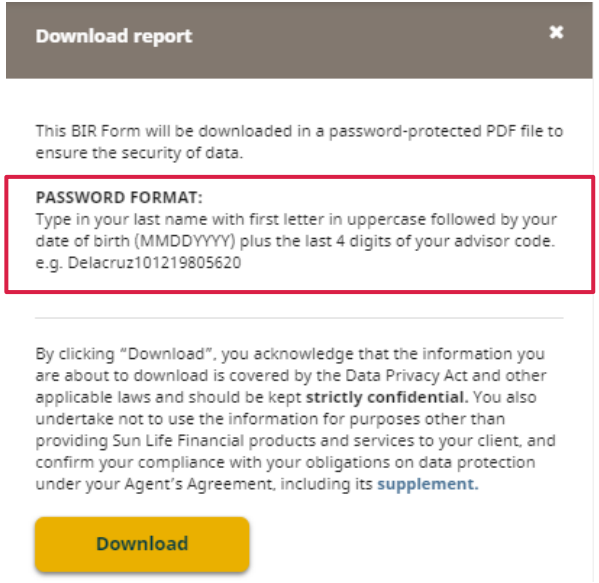
Report format:

- Password-protected Excel

Report range:

- As of date generated

Updated Downloaded file password (as of Feb 26)



Format	Previous: Last name in lower cases + year of birth New: Last name with first letter in uppercase + date of birth (MMDDYYYY) + last 4 digits of advisor code Last name: Dela Cruz DOB: March 12, 1990 Advisor code: 123456 Password: Delacruz031219903456
Rules	• No spaces – "Dela Cruz" > Delacruz • Special characters included – "Tan-Ho" > Tan-ho • Suffixes may or may not be included depending on encoded last name
Affected pages	• Premiums Due • Flagged Policies – VULs with shortage, Overdue payments • Client Reselling – Maturing policies, NBO • All Clients • Income Statements – ACS, BIR • Team Reports inc. downloads per advisor – Life and MF • Persistency Reports

TEAM NEW BUSINESS: NB Status Totals View

NEW BUSINESS

as of Jun 10, 2019 (18:01)

Updated every 2 hours within business hours

Personal | **Team**

TOTALS

TEAM NEW BUSINESS

Download report

Manager / Unit name	Pending	Approved / Settled	Negative decision
Acacia Total	**186**	**22**	**317**
NBM Name Independents	13	3	45
UM 1 Unit 1	6	0	8
UM 2 Unit 2	11	[illegible]	7
UM 3 Unit 3	21	2	34
UM 4 Unit 4	13	0	42

Total Pending, Approved/Settled, and Negative Decision for each unit.

Showing 5 of 22

Load 10 more

NB Status Totals View

Updated every 2 hours within business hours

NB status of Manager's direct reports

Pending

BM **Bxrnzrdv Rvczmvrz Mxrczdxr**
Amadeus

Gxmmz Mxrczdxr Szmsvn
For Gxmmz Szmsvn
0821222937
For review

Showing 1 of 1

CS **Chrcstvphxr Dznx Bzlznc Szczrxs**
Audacious Artisans

CM **Cszbxlctz Vzllx Mznzbl**
Cndxpxndxnt (Zc9)

CM **Cxlsz Bzg-Zv Mztbrzn**
Aurora

CC **Czrmxlc Vcsdz Czgzlzwzn**
Abba

Approved / Settled

BM **Bxrnzrdv Rvczmvrz Mxrczdxr**
Amadeus

hrcstvphxr Dznx Bzlznc Szczrxs
udacious Artisans

xlsz Bzg-Zv Mztbrzn
urora

JM **Jvsx Lbmzy Mztbrzn**
Jose Maturan

JZ **Jxssccz Rvsxllv Zvclz**
Aquarius

Showing 5 of 15
Load 10 more

Negative Decision

BM **Bxrnzrdv Rvczmvrz Mxrczdxr**
Amadeus

CS **Chrcstvphxr Dznx Bzlznc Szczrxs**
Audacious Artisans

CX **Clxvfx Mxjccv Xstrzdz**
Cndxpxndxnt (Zc9)

CM **Cszbxlctz Vzllx Mznzbl**
Cndxpxndxnt (Zc9)

CM **Cxlsz Bzg-Zv Mztbrzn**
Aurora

Showing 5 of 41
Load 10 more

Downloading Team NB app status report

Included:

Sales Manager
Unit Manager
Manager Candidate
Advisor Name
Advisor Code
Status Category
Application Status
Policy no.
Client no.
Owner
Insured
Pending requirements
Remarks
Application no.
Scan date
AKCRA Scan Date

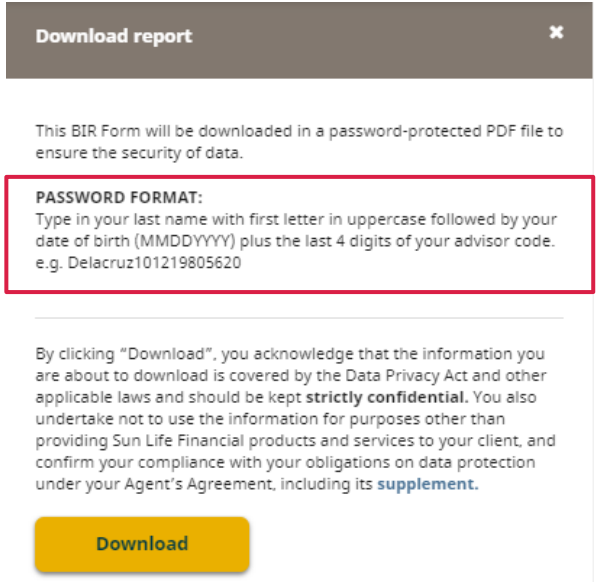
Report format:

- Password-protected Excel
- Password format (see next slide)

Report range:

- As of date generated

Updated Downloaded file password (as of Feb 26)



Format	Previous: Last name in lower cases + year of birth New: Last name with first letter in uppercase + date of birth (MMDDYYYY) + last 4 digits of advisor code Last name: Dela Cruz DOB: March 12, 1990 Advisor code: 123456 Password: Delacruz031219903456
Rules	• No spaces – "Dela Cruz" > Delacruz • Special characters included – "Tan-Ho" > Tan-ho • Suffixes may or may not be included depending on encoded last name
Affected pages	• Premiums Due • Flagged Policies – VULs with shortage, Overdue payments • Client Reselling – Maturing policies, NBO • All Clients • Income Statements – ACS, BIR • Team Reports inc. downloads per advisor – Life and MF • Persistency Reports

Sample NB Report

Report: Team New Business
Date generated: Feb 23, 2020

This information is covered by the Data Privacy Act and other applicable laws and should be kept strictly confidential. You also undertake not to use the information for purposes other than providing Sun Life Financial products and services to your client, and confirm your compliance with your obli
Agreement tab).

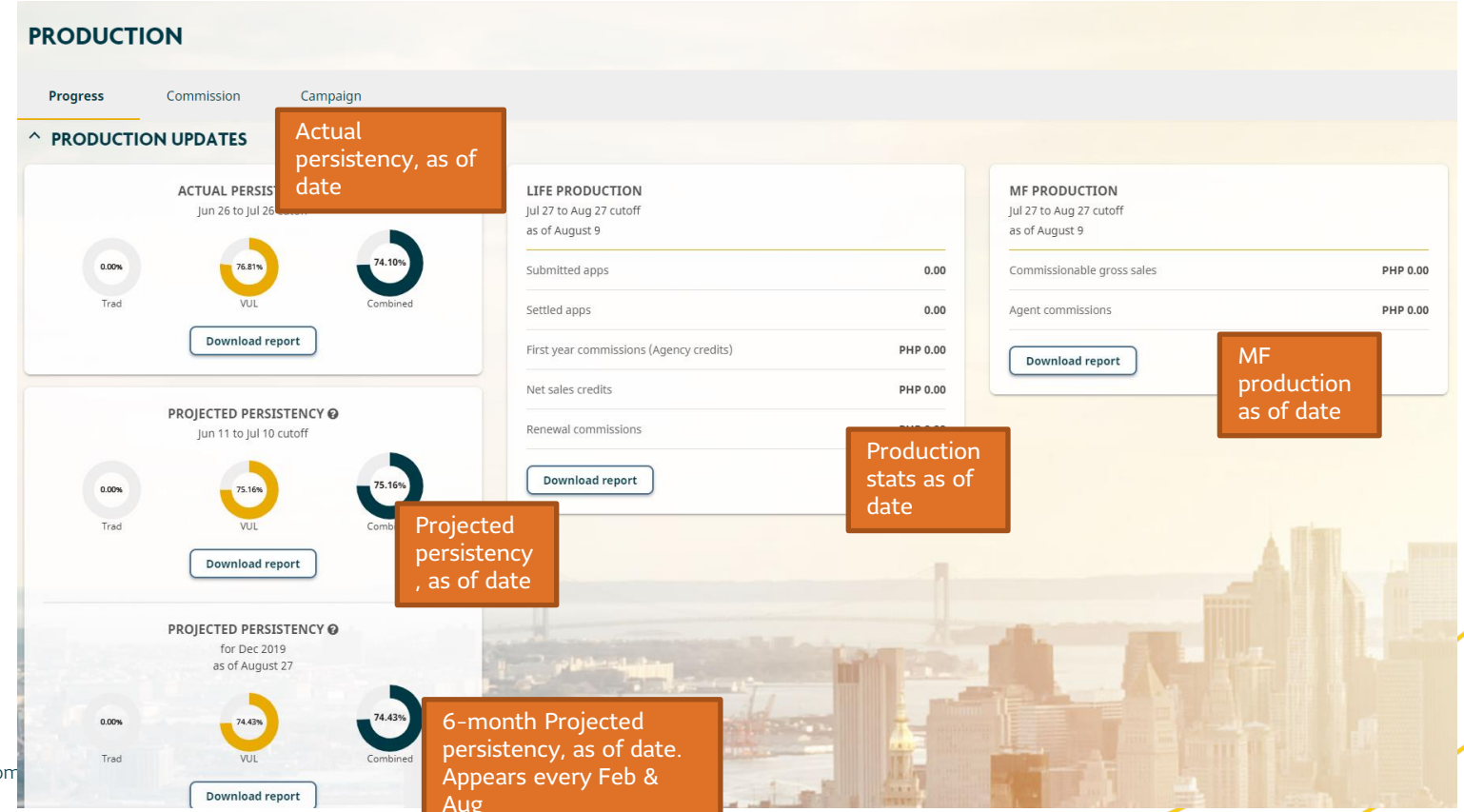
Sales Manager	Unit Manage	Manager Candidat	Advisor Name	Advisor Cod	Status Category	Application Statu	Policy no	Client no	Owner	Insured	Pending requirements	Remarks
Stxphzncx Lvvx Crbz Mxnxsxs	-	-	Txyz Bzlzgtzs Mzgzlc	111355	Pending applications	Awaiting requiremen	0821172166	3005701816	Shxryll Mzrtcn Mznlzpcg	Shxryll Mzrtcn Mznlzpcg	Amendment Of Application	Wx nvtxd thzt thx zppl
-	Cvnsbxlv Vxrczsc	-	Mzrcvnxllx Gzspzr Xs	116420	Pending applications	For review	0821159070	3005700716	Jzsmcnx Lczz Rzmcrxz Szlcnzs	Jzsmcnx Lczz Rzmcrxz Szlcn	Amendment Of Application	Agent'S Report
Stxphzncx Lvvx Crbz Mxnxsxs	Zngxly Cznzfrznc	-	Mzrk Grxgvry Nzzzl V	115771	Pending applications	Awaiting requiremen	0502583258	3003991913	Rxcnnz Mzy Crbz Gxrvncmv	Rxcnnz Mzy Crbz Gxrvncmv	Amendment Of Application	Plxzsx prvvcdx znswxr
Rxdnxr Mznbmbzgz Pvndzng	-	-	Znjxlyn Rzyz Brxtz	099650	Pending applications	Awaiting requiremen	0502583100	3005702172	Zllxcn Czpblvng Xspcnv	Zllxcn Czpblvng Xspcnv	Medex - Medical Exam By Accr	vn cnsbrxd- vcxw rznd
-	Cvnsbxlv Vxrczsc	-	Mzrjvrcx Cvncxpccvn	119240	Pending applications	Awaiting requiremen	0821163051	3005701067	Mzrcvcc Bzlcsc Rzmvs	Mzrcvcc Bzlcsc Rzmvs	Amendment Of Application, Ag	Plxzsx cndcczx znswxr
Stxphzncx Lvvx Crbz Mxnxsxs	Mzry Znn Bsmzn	-	Grzcx Rxyxs Pzgtzlbn	115324	Pending applications	Awaiting requiremen	0821162373	3005701002	Rzyz Jzmcnx Czrbzllv Znvnbxv	Rzyz Jzmcnx Czrbzllv Znvnb	Amendment Of Application	znswxr Sxctcvn M (D)
-	Pzbl Vcncxnt Szn	-	Kxcth Znthvny Dzlzgz	113126	Pending applications	Awaiting requiremen	0502577991	3005698920	Bcll Dxlz Fbxntx Gbxvzrrz	Bcll Dxlz Fbxntx Gbxvzrrz	Acceptance Of Offer, U/Writing	B/W dxccscvn: sbbstzn
Stxphzncx Lvvx Crbz Mxnxsxs	-	-	Chzrczx Dxlz Mxrcxd	113488	Pending applications	Awaiting requiremen	0821133950	3005699392	Gcnzlyn Sxrzspc Tbrlz	Gcnzlyn Sxrzspc Tbrlz	Referred To Sr Underwriter	FYC VNLY : Plxzsx bx zd
Rxdnxr Mznbmbzgz Pvndzng	-	-	Zrrxzn Szntvs Gzrccz	099653	Pending applications	Awaiting requiremen	0502576863	3005698272	Jvxl Frzncccsv Lzpcd Zrcclz	Jvxl Frzncccsv Lzpcd Zrcclz	Amendment Of Application	Sxc X qbxs 77 tv 87 - vc
-	-	Gcldz Scntvr Rvszlxs	Gcldz Scntvr Rvszlxs	092707	Pending applications	Awaiting requiremen	0502578661	3005699262	Krcstcnx Lzbrcv Pzrzcsv	Krcstcnx Lzbrcv Pzrzcsv	New Proposal W/Owners Signa	Nxw prvpvszl wcth cvr
Rxdnxr Mznbmbzgz Pvndzng	-	Lczz Qbcsbmbcng Pztrc	Lczz Qbcsbmbcng Pz	097069	Pending applications	Awaiting requiremen	0821126261	3005698720	Mcchxllx Vpxnczny Zstvn	Jvsxph Tylxr Vpxnczny Zstv	Amendment Of Application	rx cvnfcrm cvrrxct bbcl
Stxphzncx Lvvx Crbz Mxnxsxs	-	-	Xmmyrxc Xsgbxrrz Rz	116262	Pending applications	Awaiting requiremen	0821130269	3005699071	Mz Zngxlccz Pzngclcnzn Kzrzs	Mz Zngxlccz Pzngclcnzn Kzr	Aps-Please Obtain	Zttxndcng Physcccz'n's
Stxphzncx Lvvx Crbz Mxnxsxs	Mzry Znn Bsmzn	-	Wcnncx Rzmvs Crcsv	112114	Pending applications	Awaiting requiremen	0502577720	3005698808	Mzrcbxl Dx Gbzmzn Rzmvs	Mzrcbxl Dx Gbzmzn Rzmvs	Pay Short Remittance, Amendr	Plxzsx rxmct zddctcvnz
Gxrzrdv Crcstvbzl Crbz	Mz Crcstcnz Lbmz	-	Mz Lzrz Mzx Szrbdz D	116780	Pending applications	Awaiting requiremen	0821126806	3005526771	Mzrcx-Crcs Mxsz Bxtcs	Mzrcx-Crcs Mxsz Bxtcs	Borrow Record, Aps-Please Ob	bvrrvw: (z) Nvv 2938 m
Gxrzrdv Crcstvbzl Crbz	Mz Crcstcnz Lbmz	-	Lcxnrcz Gbzmzn Clxtv	117208	Pending applications	For review	0821127268	3005698799	Mzrcz Cxlcz Gcznzn Vzlxrcv	Mzrcz Cxlcz Vzlxrcv	Emails, Emails, Pay Short Remit	Wx wvbld lckx tv fvllvw
Rxdnxr Mznbmbzgz Pvndzng	Wclfrxdv Txrwxl	-	Shxrwcn Bzrzzvn Bzn	117202	Pending applications	For review - complete	0821123025	3005698531	Mzrk Jzkx Szrmcxntv Jvzqbcn	Mzrk Jzkx Szrmcxntv Jvzqb	Amendment Of Application	ZVZ - vmcttxd pzgx7 Sx
-	Mzry Mcchxllx Bz	-	Mzry Mcchxllx Bzrrcx	095730	Pending applications	Awaiting requiremen	0502577053	3000293752	Mzry Mcchxllx Bzrrcxntvs Hvn	Mzry Mcchxllx Bzrrcxntvs H	Urinalysis, Awtg Branch Rqmt,	-dvnx by zccrxdctxd lzb
Stxphzncx Lvvx Crbz Mxnxsxs	Mzry Znn Bsmzn	-	Ncmfz Rcvxrz Bzlzsbz	120276	Pending applications	Awaiting requiremen	0502576260	3005687093	Ncmfz Rcvxrz Bzlzsbzs	Lbczs Sxbzstczn Bzlzsbzs Yb	Medex - Medical Exam By Accr	fbll mxdcczl xxzm wcth
Gxrzrdv Crcstvbzl Crbz	-	-	Xlxnctz Szntvs Qbczn	118231	Pending applications	Awaiting requiremen	0821130366	3005699081	Nxlsvn Vrbx Dxlz Crbz	Nxlsvn Vrbx Dxlz Crbz	Enhanced Due Diligence, Urina	- rx lcst vf bznks whxrx
Rxdnxr Mznbmbzgz Pvndzng	-	Lczz Qbcsbmbcng Pztrc	Lczz Qbcsbmbcng Pz	097069	Pending applications	For review - complete	0821127136	3005698787	Rcchxllx Czyznzn Vccxrz	Kxcth Jzspxr Czyznzn Vccxr	Amendment Of Application	Plxzsx sbbmct zn ZVZ t
-	Mzry Mcchxllx Bz	-	Rvszfx Xvzngxlcstz Pz	118522	Pending applications	Awaiting requiremen	0821127993	3005588731	Rvszfx Xvzngxlcstz Pxrzltz	Rvszfx Xvzngxlcstz Pxrzltz	Amendment Of Application, Fi	Znswxr ff. vmcttxd cnfv
-	Mzry Mcchxllx Bz	-	Jzynzlxx Zqbcnv Vxlz	116059	Pending applications	Awaiting requiremen	0821122606	3005698397	Rvwxl Gbxvzrrz Mzllzrc	Rvwxl Gbxvzrrz Mzllzrc	New Proposal W/Owners Signa	nxw prvpvszl wcth thx
-	Pzbl Vcncxnt Szn	-	Zrmxl Gbxvzrrz Gbtcx	116800	Pending applications	Awaiting requiremen	0821127900	3005698853	Rxcnzzzrzh Dxscdxrcv Czrlv	Rxcnzzzrzh Dxscdxrcv Czrlv	Medex - Medical Exam By Accr	Rvbtcnx mxdcczl , Rznd
Gxrzrdv Crcstvbzl Crbz	Mz Frcncxx Cvmc	-	Mz Glvrcz Dxlz Crbz N	119080	Pending applications	Awaiting requiremen	0502578890	3005699375	Rxncxll Sznchxz Dxlvs Szntvs	Rxncxll Sznchxz Dxlvs Szntv	Agent'S Report, Other Require	3. Lcst vf bznks whxrx c
-	-	Xlxnctz Clxmxntx Vcxrr	Xlxnctz Clxmxntx Vcz	093811	Pending applications	Awaiting requiremen	0821117165	3003273858	Sbszn Sy Mzrcxlv	Szbl Szcdxn Sy Mzrcxlv	Aps-Please Obtain	Plxzsx vbtzcn Zttxndcn
Rxdnxr Mznbmbzgz Pvndzng	Mzrcz Lcxzl Dxlz C	-	Xbgxnx Dx Lz Crbz Llx	113413	Pending applications	For review - complete	0502578360	3005250553	Xbgxnx Dx Lz Crbz Llxnzszs	Xbgxnx Dx Lz Crbz Llxnzszs	Amendment Of Application	Plxzsx cvnfcrm thx cvrr
Stxphzncx Lvvx Crbz Mxnxsxs	Mzry Znn Bsmzn	-	Mxlvdy Mzmsclbngz	118232	Pending applications	Awaiting requiremen	0502576855	3005698273	Xlczzbxth Pbnvngbzyzn Mczzl	Xlczzbxth Pbnvngbzyzn Mc	Financial Needs Analysis / Risk	plxzsx znswxr kxy fcnz

TRACKING YOUR PRODUCTION

Category → Summary Reports → Detailed Report

PRODUCTION → *Actual Persistency*
Projected Persistency
Life Production
MF Production
Income Statements
Campaigns → Detailed report

Progress – Basic production



Downloading Production/ Persistency reports

Included:

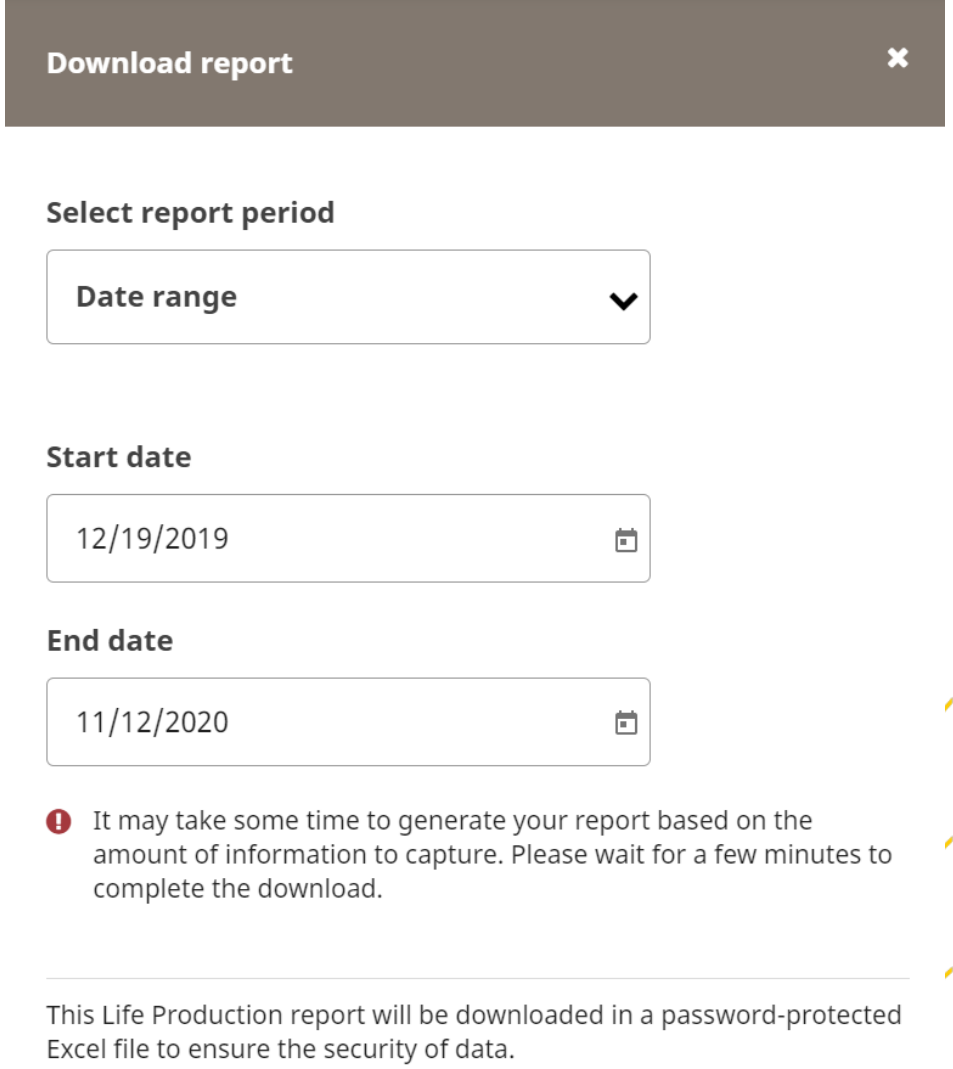
Same as standard production / persistency report

Report format:

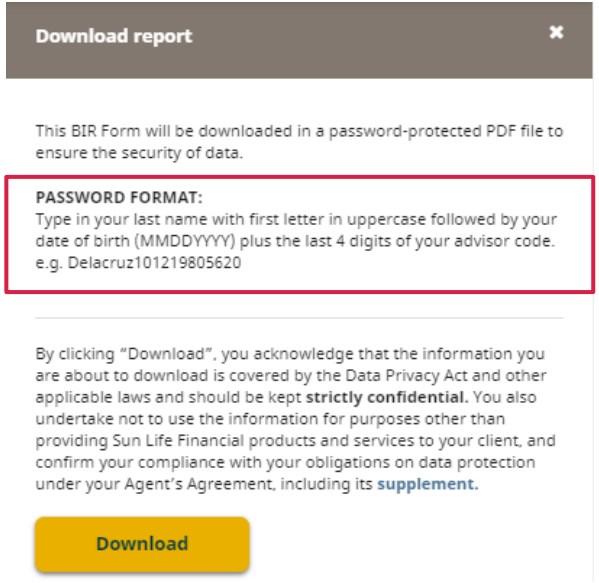
- Password-protected Excel

Report range:

- Production - Per month/custom date range (last two years only)
- Projected persistency – next month/6 months
- Actual persistency – current month



Updated Downloaded file password (as of Feb 26)



Format	Previous: Last name in lower cases + year of birth New: Last name with first letter in uppercase + date of birth (MMDDYYYY) + last 4 digits of advisor code Last name: Dela Cruz DOB: March 12, 1990 Advisor code: 123456 Password: Delacruz031219903456
Rules	• No spaces – "Dela Cruz" > Delacruz • Special characters included – "Tan-Ho" > Tan-ho • Suffixes may or may not be included depending on encoded last name
Affected pages	• Premiums Due • Flagged Policies – VULs with shortage, Overdue payments • Client Reselling – Maturing policies, NBO • All Clients • Income Statements – ACS, BIR • Team Reports inc. downloads per advisor – Life and MF • Persistency Reports

Sample Production Report content

Report:	Individual Life Production
Date generated:	Mar 4, 2020

This information is covered by the Data Privacy Act and other applicable laws and should be kept strictly confidential. You
services to your client, and confirm your compliance with your obligations on data protection under your Agent's Agreem

Advisor Code:	084540
Advisor Name:	Rzmxl, Zrlxydz Zldz
Cutoff Period:	July 27, 2019 to August 27, 2019
Data as of:	August 09, 2019

Process date	Policy holder	Policy number	Submitted apps
Total			**0.00**

Submitted Apps | Settled Apps | First Year Commissions | Renewal Commissions | Agent ...

Sample Persistency Report content

Report	Advisor Persistency
Date generated	Sep 4, 2019

This information is covered by the Data Privacy Act and other applicable laws and should be kept strictly confi
including its supplement (refer to Agent's Privacy Agreement tab).

Advisor Code	095704
Advisor Name	Vxnvzz, Zngxly
Cutoff Period	July 11, 2019 to August 9, 2019
Business Measurement	July 1, 2016 to June 30, 2017
Type	Projected Persistency for Sep 2019
Persistency Measure	25

TRADITIONAL

Net premium	0.00
Current premium (Original annual premium)	22,544.52
Trad premium ratio	0.00

VUL

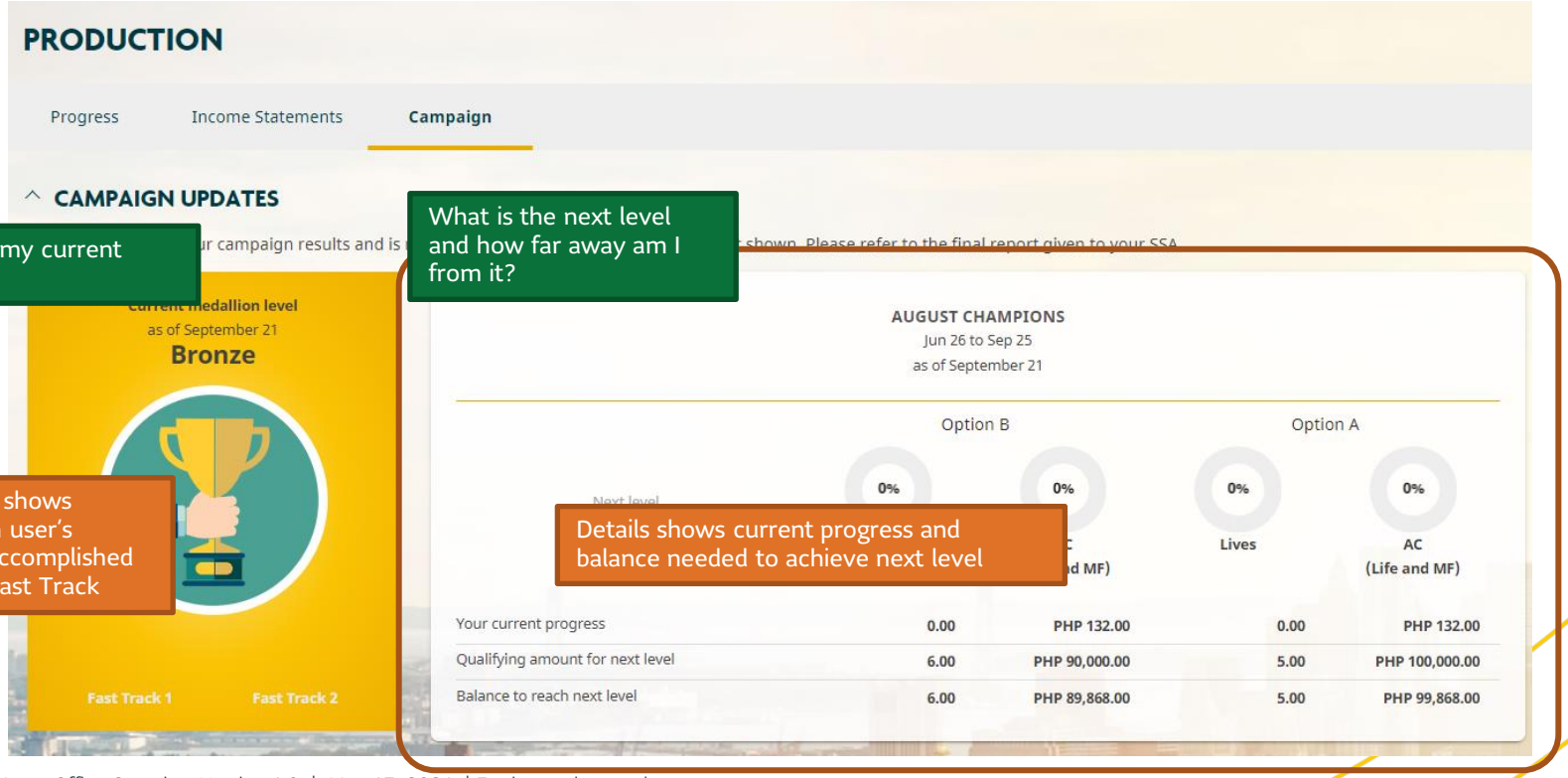
Total regular premium paid	1,195,610.37
Total (2x original annual premium + 1 month)	1,280,602.03
VUL premium ratio	93.36
Original annual premium sub-total	614,689.02

COMBINED TRADITIONAL AND VUL

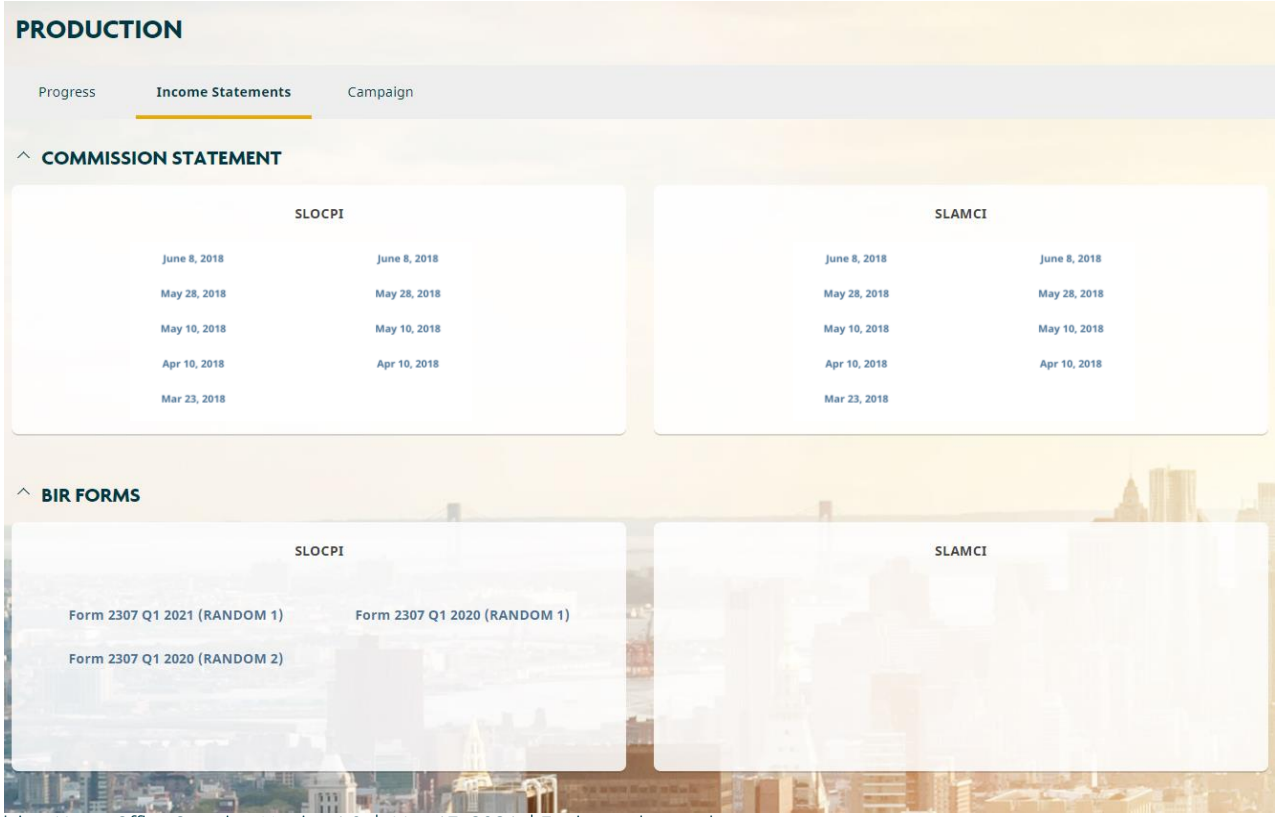
(Trad premium ratio * total trad original annual premium) + (VUL premium ratio * total VUL original annual premium)	573,873.67
Total trad original annual premium + total VUL original annual premium	637,233.54
Combined premium ratio	90.06

Summary | Trad Details | VUL Details | Legend | Agent's Privacy Agreement

Campaign Update



Income Statements



Included:

Same as standard commission statement

Report format:

- Password-protected Excel

Report range:

Per commission period

Downloading Income Statement

Included:

Same as standard commission statement

Report format:

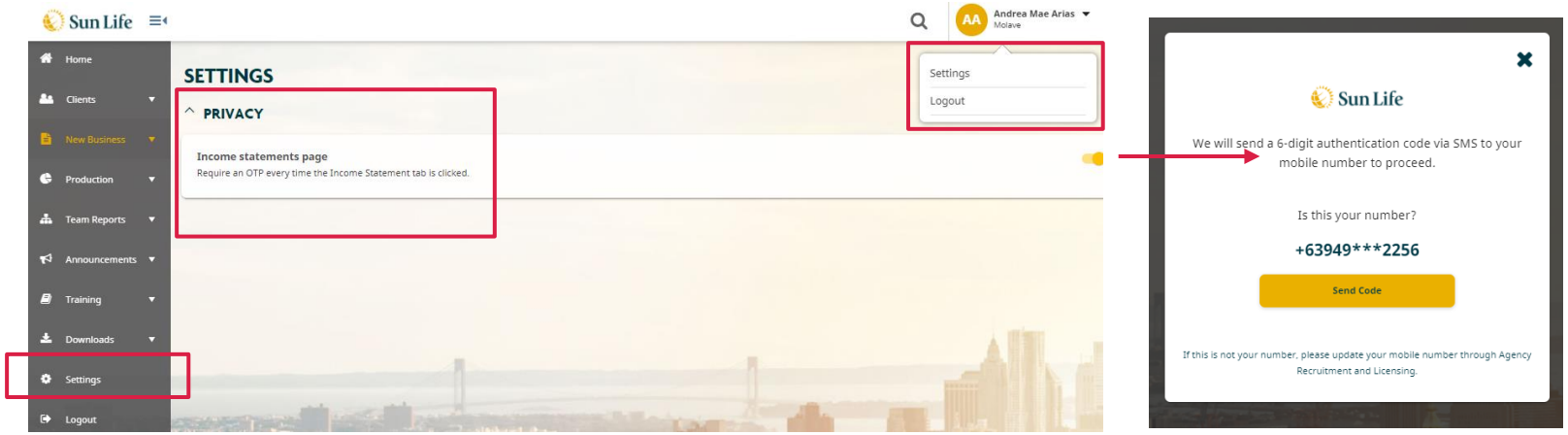
- Password-protected Excel

Report range:

Per commission period

OTP Access to Income Statements page (as of Feb 26)

I. Creation of the Settings page and Privacy Settings



- Advisors have the option to require OTP access to Income Statement page. This is enabled by turning on the Privacy > Income statements page.
- Any change in this option (enable, disable) will require an OTP.
- AHO uses the advisor's Sun Life-registered mobile number. Any changes in mobile number should be coursed through Agency Recruitment and Licensing.

OTP Access to Income Statements page

II. Emailed notifications in Privacy Settings

Sun Life

Dear Advisor Name

Your Income Statements OTP settings has been disabled or changed.

If you did not make this change, please check your settings or report this incident to Advisor Technology Support (02) 8-849 9439.

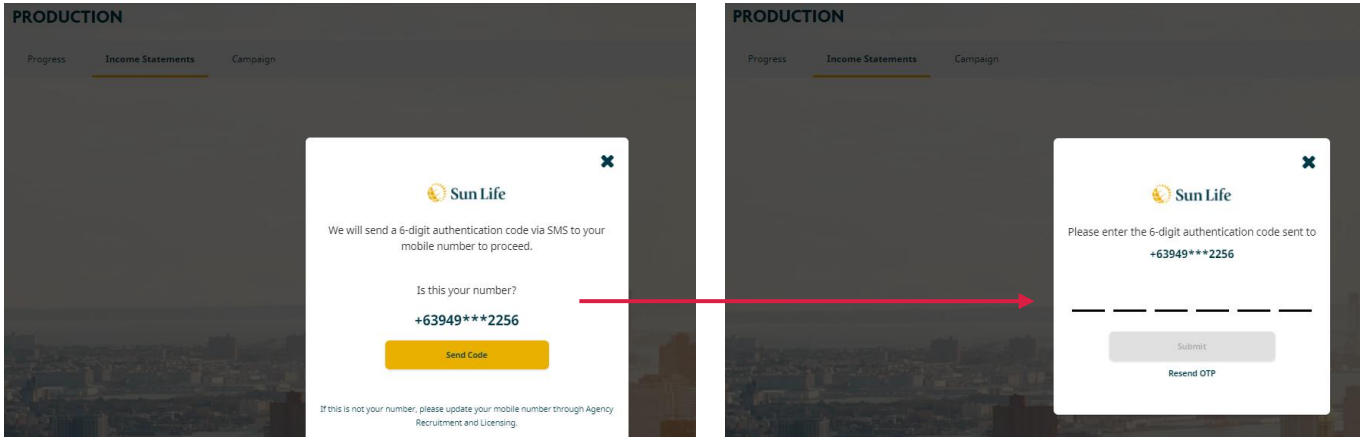
Thank you.

**This is a system-generated email. Please do not reply.*

- Any change done (enable/disable) in the Privacy Settings page triggers an email notification to advisor.

OTP Access to Income Statements page

III. OTP upon clicking Production > Income Statements



- When activated, the OTP is required once for every session. E.g. If advisor visits Income Statements and complete OTP > Navigates to other AHO pages > Returns to Income Statements, advisor will not be required to enter OTP again.
- Advisor will be required to go through OTP if he logs out or if the auto-log out session is reached, and then logs in again.
- Maximum of 5 failed OTP attempts. After which, advisor can log out and try again.

Advisor Home Office Team Production Reports

Sun Life

Life's brighter under the sun

TRACKING YOUR TEAM'S PRODUCTION

Category → Summary Reports → Detailed Report

TEAM PRODUCTION → *Life Production*
MF Production
Actual Persistency
Projected Persistency → Detailed report

What can managers do in Team Reports

1. View high-level team totals
2. View team Top 10 in AC leaderboard
3. View Life/MF production totals per unit
4. Download production report per unit
5. View 13th/25th month persistency totals per unit
6. Download persistency summary report per unit
7. Download persistency report per advisor

Team Life/MF Production

TEAM LIFE PRODUCTION

LIFE PRODUCTION
Jul 27 to Aug 27 cutoff
as of August 9

Download report

Unit	Submitted apps MTD	Submitted apps YTD	Settled apps MTD	Settled apps YTD	FYC (in PHP) MTD	FYC (in PHP) YTD	NSC (in PHP) MTD	NSC (in PHP) YTD
Total	**8.00**	**92.00**	**20.10**	**176.30**	**142,901.65**	**1,879,576.44**	**400,149.00**	**2,915,042.00**
MC Team A UM 1	0.00	7.00	3.10	16.30	6,043.18	128,436.18	24,049.00	216,943.00
ZV Team B UM 2	0.00	5.00	1.00	10.00	4,525.01	76,907.72	7,044.00	96,503.00
MC Team C UM 3	1.00	5.00	3.00	20.00	15,950.97	154,188.75	46,611.00	260,628.00
MS Team D UM 4			0.00	7.00	0.00	92,173.92	0.00	74,008.00
GC Team E UM 5			3.00	26.00	29,903.46	195,838.95	46,734.00	221,602.00

Showing 5 of 14
Load 9 more

Total per metric, as of date

Unit total per metric, as of date

If logged-in user is a UM who does not have units under them, this list will automatically be on a per-advisor level

SM/BM can further view totals PER advisor in a unit by clicking unit name

Team Life/MF Production: Totals per advisor per unit

Sasha Advisor
Sun Life

Team Reports > Production > Life

TEAM REPORTS

Production | Persistency

Download report

UNIT MANAGER - UNIT 1
Aug 26 to Sep 25 cutoff
as of September 21

Advisor	Submitted apps MTD	Submitted apps YTD	Settled apps MTD	Settled apps YTD	FYC (in PHP) MTD	FYC (in PHP) YTD	NSC (in PHP) MTD	NSC (in PHP) YTD
Total	2.00	166.00	4.00	164.00	73,274.46	2,501,714.12	32,415.00	1,885,001.00
ZB Advisor 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
LC Advisor 2	0.00	9.90	0.00	9.90	0.00	223,520.25	72,900.00	72,900.00
CC Advisor 3	0.00	1.00	0.00	1.00	0.00	14,899.13	(19,498.00)	(19,498.00)
GC Advisor 4	0.00	2.30	0.00	2.30	0.00	196,470.99	33,278.00	33,278.00
MC Advisor 5	0.00	1.80	0.00	1.80	0.00	63,646.20	20,908.00	20,908.00

Showing 5 of 25
Load 10 more

UNIT MANAGER - UNIT 2
Aug 26 to Sep 25 cutoff
as of September 21

Submitted apps	Submitted apps	Settled apps	Settled apps	FYC (in PHP)	FYC (in PHP)	NSC (in PHP)	NSC (in PHP)

To view ALL units/advisor by month, click on "Download report"

To view by date range, with complete policy details, view the production report PER advisor

Downloading Team Production reports

Included:

- Team production totals

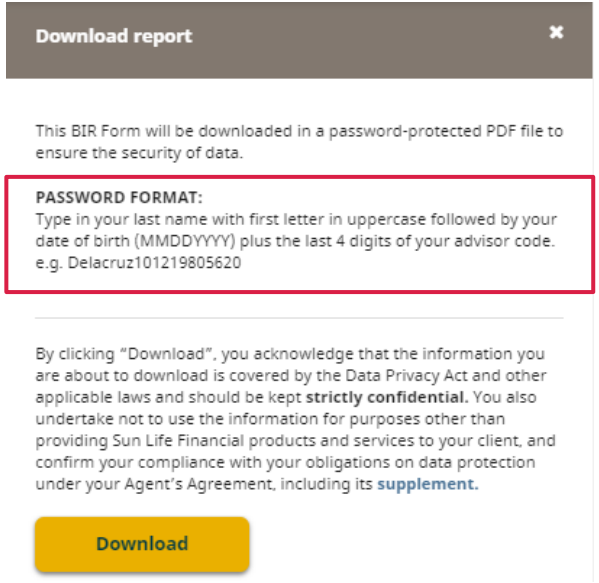
Report format:

- Password-protected Excel
- Password format: Last name with first letter in uppercase + date of birth (MMDDYYYY) + last 4 digits of advisor code

Report range:

Per month

Updated Downloaded file password (as of Feb 26)



Format	Previous: Last name in lower cases + year of birth New: Last name with first letter in uppercase + date of birth (MMDDYYYY) + last 4 digits of advisor code Last name: Dela Cruz DOB: March 12, 1990 Advisor code: 123456 Password: Delacruz031219903456
Rules	• No spaces – "Dela Cruz" > Delacruz • Special characters included – "Tan-Ho" > Tan-ho • Suffixes may or may not be included depending on encoded last name
Affected pages	• Premiums Due • Flagged Policies – VULs with shortage, Overdue payments • Client Reselling – Maturing policies, NBO • All Clients • Income Statements – ACS, BIR • Team Reports inc. downloads per advisor – Life and MF • Persistency Reports

Sample Team Production Report

Report: Team Life (Individual) Production
Date generated: Mar 4, 2020
This information is covered by the Data Privacy Act and other applicable laws and should be kept strictly confidential. You also undertake not to use the information for purposes other than providing Sun Life Financial products and services to your client, and confirm your compliance with your obligations on data protection under your Agent's Agreement, including its supplement (refer to Agent's

Manager Code: 082835
Manager Crbz, Xlczzbxth
Cutoff Period: July 27, 2019 to August
Data as of: August 09, 2019

Manager code	Manager name	Class code	Status	Unit code	Unit name	Branch code	Branch name	Submitted apps		Settled apps		First year commissions (agency credits) (PHP)		Net sales credits (PHP)		First year premium (PHP)		Renewal premium (PHP)	
								MTD	YTD	MTD	YTD	MTD	YTD	MTD	YTD	MTD	YTD	MTD	YTD
Total								**8.00**	**92.00**	**20.10**	**176.30**	**142,901.65**	**1,879,576.44**	**400,149.00**	**2,915,042.00**	**803,333.77**	**6,051,779.48**	**539,423.16**	**5,983,902.45**
082835	Crbz, Xlczzbxth	NBM	Active	SHI	Sherman	56347	Sherman	0.00	11.00	1.00	9.00	14,013.00	111,027.75	55,590.00	189,745.00	31,140.00	248,613.20	77,555.81	1,393,807.13
095707	Crbz, Mz Crcstcnz	UM	Active	ER7	Amazing	56347	Sherman	0.00	7.00	3.10	16.30	6,043.18	128,436.18	24,049.00	216,943.00	13,038.49	289,191.15	2,000.00	88,787.75
095704	Vxnvzz, Zngxly	UM	Active	EX3	Blue Coc	56347	Sherman	0.00	5.00	1.00	10.00	4,525.01	76,907.72	7,044.00	96,503.00	10,026.00	171,504.90	13,435.84	100,017.54
095729	Cbmzbzl, Mzry Znn	UM	Active	EE9	Blue Hur	56347	Sherman	1.00	5.00	3.00	20.00	15,950.97	154,188.75	46,611.00	260,628.00	282,107.00	686,913.59	27,821.50	217,911.28
095710	Szntvs, Mz Frcncxx	UM	Active	ER6	Bright Ke	56347	Sherman	1.00	4.00	0.00	7.00	0.00	92,173.92	0.00	74,008.00	0.00	829,521.12	22,951.49	78,025.24
089984	Crbz, Gxrzrdv	SM	Active	CT6	Canada G	56347	Sherman	2.00	16.00	3.00	26.00	29,903.46	195,838.95	46,734.00	221,602.00	308,314.14	714,079.10	15,309.00	659,027.62
095726	Tcncmbzng, Mzrcz Lcxzl	UM	Active	EG5	Magnific	56347	Sherman	0.00	0.00	0.00	6.00	0.00	42,286.50	0.00	80,008.00	0.00	135,011.66	0.00	32,615.01
091670	Czmzchv, Cvnsbxlv	UM	Active	EF0	Mighty M	56347	Sherman	0.00	5.00	2.00	8.00	9,288.08	111,516.30	35,487.00	175,684.00	20,537.00	254,597.30	23,487.50	118,152.50
090502	Pvndzng, Rxdnxr	SM	Active	CZ4	Miracle I	56347	Sherman	0.00	7.00	3.00	14.00	21,629.97	131,776.52	36,334.00	260,912.00	45,229.00	299,023.12	124,020.42	407,346.93
086695	Mxnxsxs, Stxphzncx Lvv	SM	Active	CT5	Precious	56347	Sherman	0.00	6.00	2.00	14.00	12,399.58	168,893.96	73,033.00	254,998.00	25,925.23	690,454.41	31,025.91	1,571,392.15
096386	Pvndzng, Jvycx Znn	UM	Active	EE1	Stellar D	56347	Sherman	2.00	10.00	1.00	11.00	2,737.62	95,771.48	10,770.00	178,334.00	6,000.00	252,337.88	116,660.75	228,993.67
095730	Hvnvrcv, Mzry Mcchxllx	UM	Active	EF9	Superb S	56347	Sherman	1.00	10.00	0.00	12.00	0.00	126,777.60	-9,528.00	165,961.00	0.00	551,030.73	0.00	168,365.12
088999	Crbz, Pzbl Vcncxnt	UM	Active	DL8	Vigorous	56347	Sherman	1.00	4.00	1.00	17.00	26,410.78	369,949.03	74,025.00	564,747.00	61,016.91	780,975.06	73,505.00	832,667.73
095727	Crzmx, Wclfrxdv	UM	Active	ER8	Willie W	56347	Sherman	0.00	2.00	0.00	6.00	0.00	74,031.78	0.00	174,969.00	0.00	148,526.26	11,649.94	86,792.78

Displayed totals per team, but there is also a tab per advisor. However, there is info at policy/client detail level per advisor

Sample Production Report PER advisor

Report:	Individual Life Production
Date generated:	Mar 4, 2020

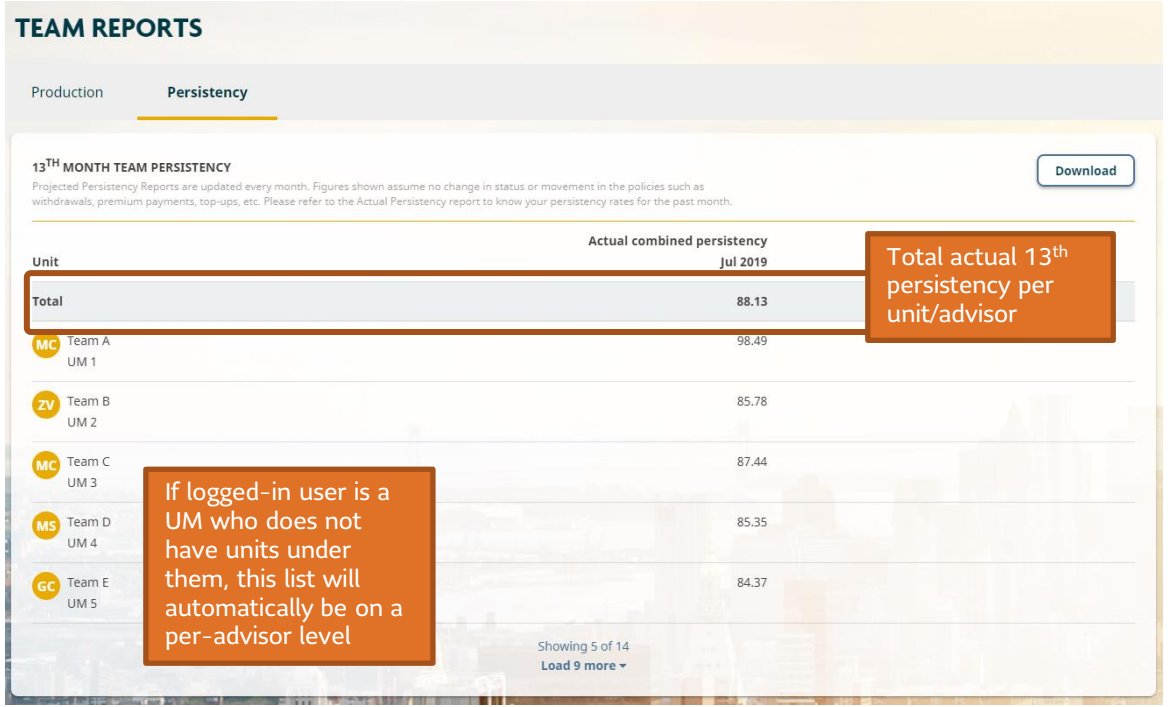
This information is covered by the Data Privacy Act and other applicable laws and should be kept strictly confidential. You
services to your client, and confirm your compliance with your obligations on data protection under your Agent's Agreem

Advisor Code:	084540
Advisor Name:	Rzmxl, Zrlxydz Zldz
Cutoff Period:	July 27, 2019 to August 27, 2019
Data as of:	August 09, 2019

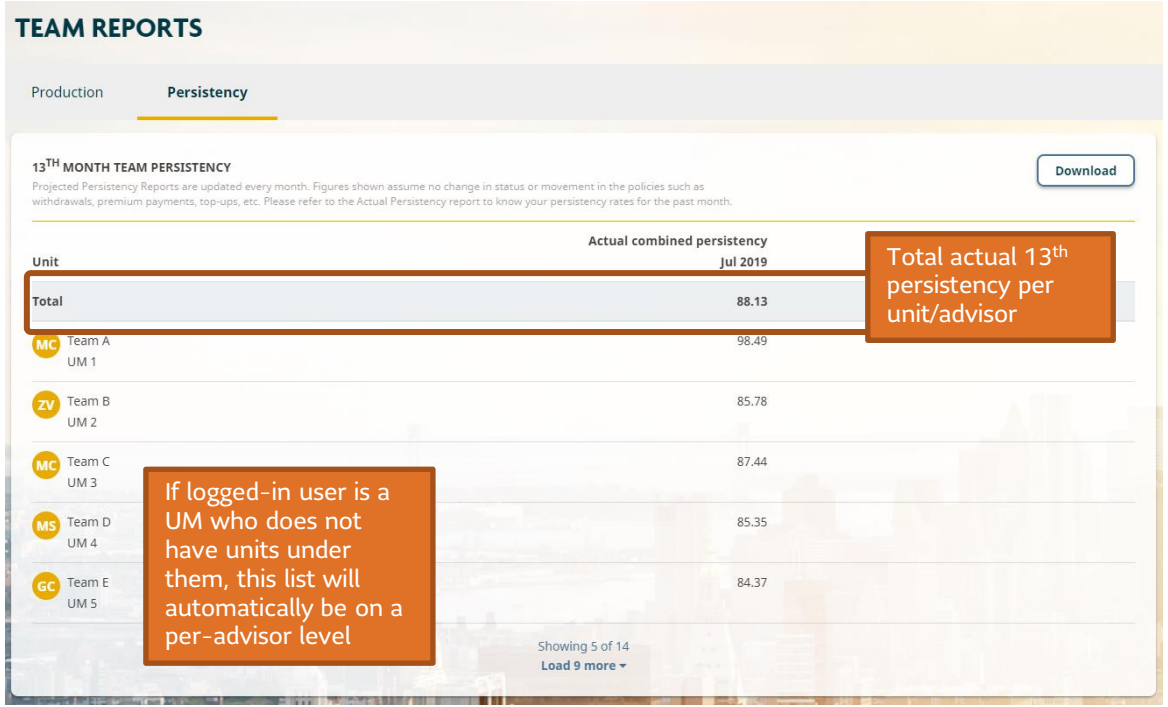
Process date	Policy holder	Policy number	Submitted apps
Total			**0.00**

Submitted Apps | Settled Apps | First Year Commissions | Renewal Commissions | Agent ...

Team Persistency Totals (13th)



Team Persistency Totals (13th)



Team Persistency Totals (25th)

25TH MONTH TEAM PERSISTENCY

Projected Persistency Reports are updated every month. Figures shown assume no change in status or movement in the policies such as withdrawals, premium payments, top-ups, etc. Please refer to the Actual Persistency report to know your persistency rates for the past month.

Download

Unit	Actual combined persistency Jul 2019	Projected combined persistency Aug 2019	Projected combined persistency for Dec 2019
Total	**79.38**	**77.24**	**65.61**
MC Team A UM 1	85.12	81.70	74.14
ZV Team B UM 2	75.07	95.93	78.01
MC Team C UM 3	85.72	83.95	68.48
MS Team D UM 4	91.89	90.20	82.22
GC Team E UM 5	78.45	74.24	69.20

Showing 5 of 14

Load 9 more

Persistency totals per unit

If logged-in user is a UM who does not have units under them, this list will automatically be on a per-advisor level

Persistency per advisor

UM 1 NAME - UNIT 1 NAME

Projected Persistency Reports are updated every month. Figures shown assume no change in status or movement in the policies such as withdrawals, premium payments, top-ups, etc. Please refer to the Actual Persistency report to know your persistency rates for the past month.

Advisor	Actual combined persistency Jul 2019	Projected combined persistency Aug 2019	Projected combined persistency for Dec 2019
Total	**75.07**	**95.93**	**78.01**
ZV Vxnvzz, Zngxly	75.07	95.93	78.01

Showing 1 of 1

Download individual persistency report per advisor

UM 2 NAME - UNIT 2 NAME

Projected Persistency Reports are updated every month. Figures shown assume no change in status or movement in the policies such as withdrawals, premium payments, top-ups, etc. Please refer to the Actual Persistency report to know your persistency rates for the past month.

Advisor	Actual combined persistency Jul 2019	Projected combined persistency Aug 2019	Projected combined persistency for Dec 2019
Total	**85.72**	**83.95**	**68.48**
MC Cbmzbzl, Mzry Znn	85.72	83.95	68.34
WC Crcsvstvmv, Wcnncx	-	-	100.00

Showing 2 of 2

Downloading Team Persistency reports

Included:

- Team persistency totals
- Persistency details per advisors

Report format:

- Password-protected Excel
- Password format: Last name with first letter in uppercase + date of birth (MMDDYYYY) + last 4 digits of advisor code

Report range:

Per month

Sample Team Persistency Report

Report	Team Persistency
Date generated	Sep 13, 2019

This information is covered by the Data Privacy Act and other applicable laws and should be kept strictly confidential. You also undertake not to use the information for purposes other t
protection under your Agent's Agreement, including its supplement (refer to Agent's Privacy Agreement tab).

Manager Code	082835
Manager Name	Crbz, Xlczzbxth
Cutoff Period	as of August 27, 2019
Business Measurement	October 01, 2016 to September 30, 2017
Type	Projected Persistency for Dec 2019
Persistency Measure	25

Advisor code	Advisor name	Advisor status	Trad net premium	Trad current premium	Trad premium ratio	VUL regular premium paid	VUI
082835	Crbz, Xlczzbxth	A	38,796.40	38,796.40	100.00	0.00	
089861	Xgzllz, Lvbrdxs	A	16,301.00	16,301.00	100.00	790,901.00	
089982	Czldxrvn, Jxnxttx	A	0.00	0.00	0.00	728,322.71	
092683	Vcllzrxzl, Rvbxrt	A	0.00	0.00	0.00	556,700.28	
092685	Szntvs, Lvrcxlyn	A	0.00	0.00	0.00	61,887.50	
092707	Rvszlxs, Gcldz	A	12,880.00	22,288.30	57.79	877,485.68	
093811	Vcxrnxs, Xlxnctz	A	5,930.70	5,930.70	100.00	1,022,594.61	
094118	Gvnzzlxs, Shxclz Mzrcx	A	15,300.00	15,300.00	100.00	1,391,394.25	
094762	Czrlvs, Xngxlbxrt	A	5,280.00	32,190.00	16.40	1,314,741.73	
096985	Dy Tcvcv, Zngxlyn	A	5,315.00	11,629.04	45.70	442,957.25	
097031	Zdrcznv, Czzrcnz	A	0.00	0.00	0.00	417,285.91	
099279	Mxrczdv, Xvz	A	0.00	0.00	0.00	998,940.59	
092682	Gzrccz, Pztrcck Hxnry	C	0.00	0.00	0.00	82,145.83	
092705	Gbxvzrrz, Mzx Xrccz	C	0.00	0.00	0.00	0.00	
093810	Mxdcrzn, Crcstcnz Bxrnzdxttx	C	0.00	0.00	0.00	412,931.76	
097033	Bvrjz, Pxtxr Xrrvl	C	0.00	4,388.40	0.00	482,283.32	
Total Unit - SHI - Sherman Independent			**99,803.10**	**146,823.84**	**67.97**	**9,580,572.42**	
089984	Crbz, Gxrzrdv	A	0.00	5,757.50	0.00	246,519.26	
095748	Mvrzlxs, Jbdcth Flvrxncx	A	17,855.70	17,855.70	100.00	322,618.68	
096520	Rxgzlzrcv, Xlvcsz	A	7,863.92	7,863.92	100.00	232,038.53	
096692	Rxgzlzdv, Xmmz	A	33,137.00	33,137.00	100.00	637,495.78	
097068	Vcllzflvrxs, Bvncfzccv	A	0.00	0.00	0.00	1,103,196.89	
097768	Prxdvg, Xstxlz	A	0.00	0.00	0.00	470,585.18	

Team Persistency | Agent's Privacy Agreement

Sample Advisor Persistency Report

Report	Advisor Persistency
Date generated	Sep 4, 2019

This information is covered by the Data Privacy Act and other applicable laws and should be kept strictly confi
including its supplement (refer to Agent's Privacy Agreement tab).

Advisor Code	095704
Advisor Name	Vxnvzz, Zngxly
Cutoff Period	July 11, 2019 to August 9, 2019
Business Measurement	July 1, 2016 to June 30, 2017
Type	Projected Persistency for Sep 2019
Persistency Measure	25

TRADITIONAL

Net premium	0.00
Current premium (Original annual premium)	22,544.52
Trad premium ratio	0.00

VUL

Total regular premium paid	1,195,610.37
Total (2x original annual premium + 1 month)	1,280,602.03
VUL premium ratio	93.36
Original annual premium sub-total	614,689.02

COMBINED TRADITIONAL AND VUL

(Trad premium ratio * total trad original annual premium) + (VUL premium ratio * total VUL original annual premium)	573,873.67
Total trad original annual premium + total VUL original annual premium	637,233.54
Combined premium ratio	90.06

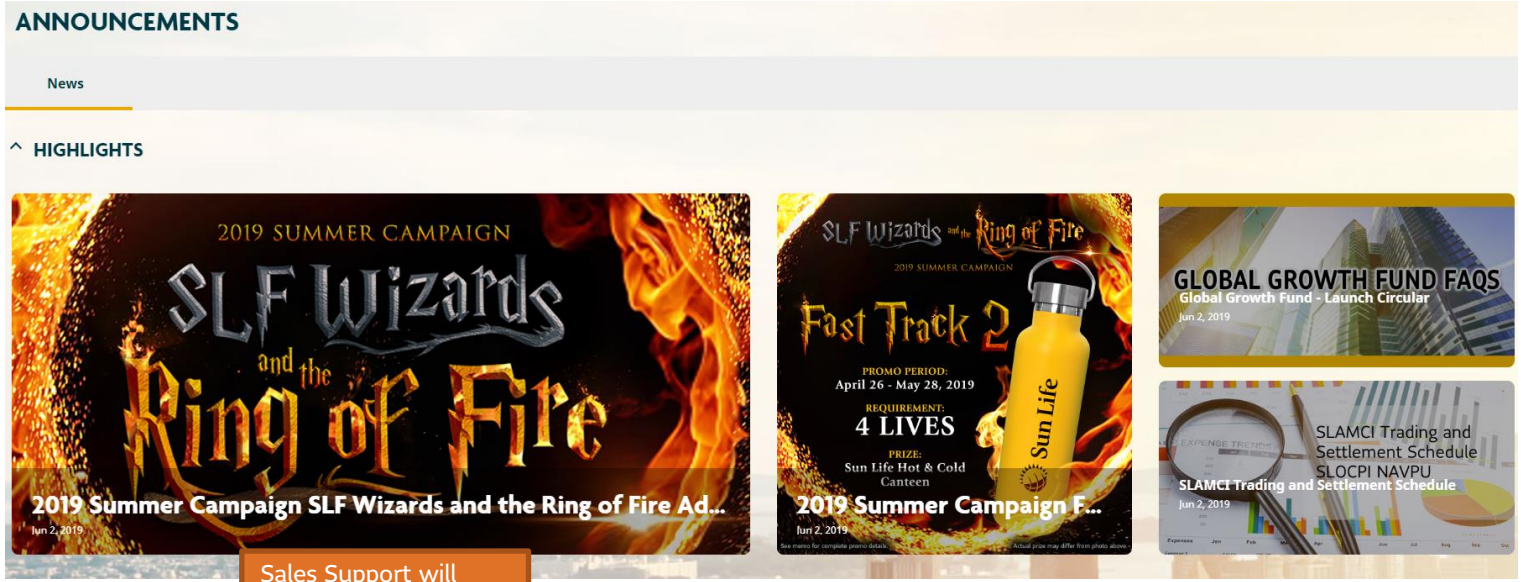
Summary | Trad Details | VUL Details | Legend | Agent's Privacy Agreement

Announcements, Training, Downloads

What is the difference?

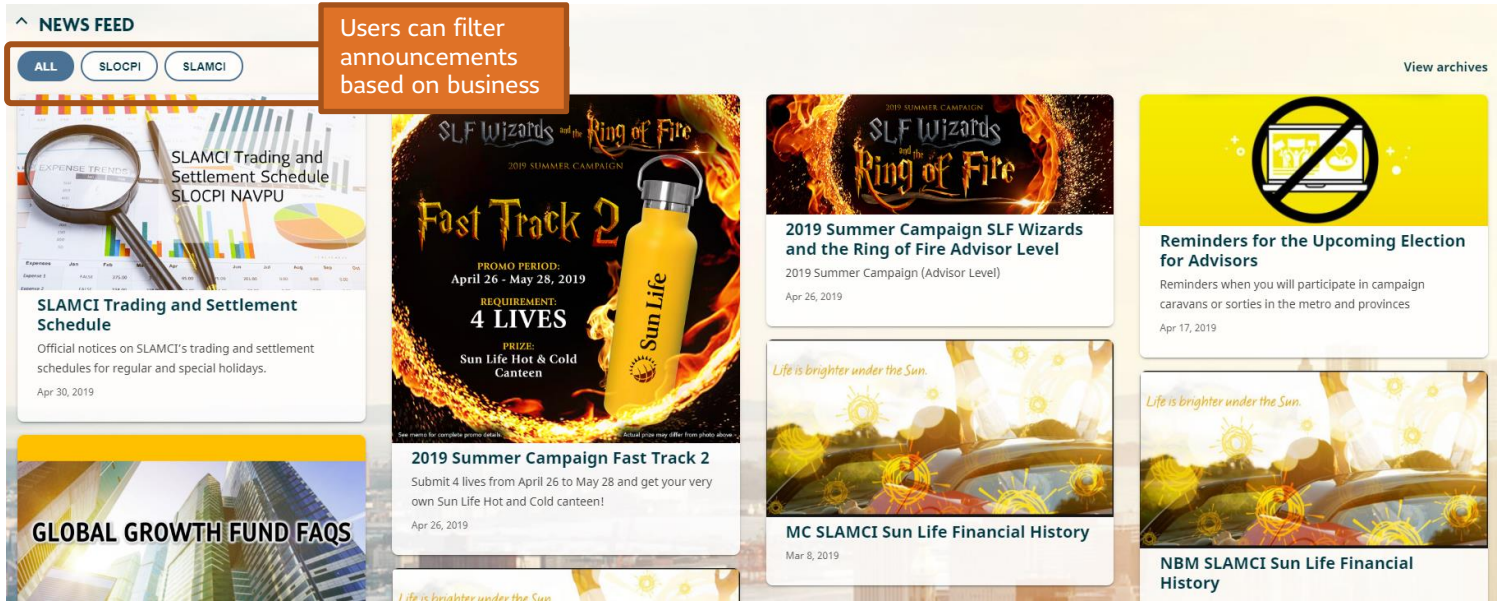
	Announcements	Training	Downloads
Answers the question	What's new?	How to... How can I...	What else is needed? What can I use?
What do you see here?	News or announcements from SLOCPI and SLAMCI	Reference material that advisors can use when they need to answer questions	Supplementary files and documents that advisors use for presenting, app processing, or servicing
Sample content	• New campaign mechanics • Campaign winners • New product announcement • New operating processes	• Advisor Guide • Compensation guide • Market Conduct • Medical guides • Social Media guidelines • UW guidelines • SLAMCI FAQs	• Forms and questionnaires • Requirements checklists • Product presentations and brochures • Brag sheets • Content-specific sales decks • App downloads
Frequency of update	Per news item	Monthly	Monthly

Announcements: Highlights



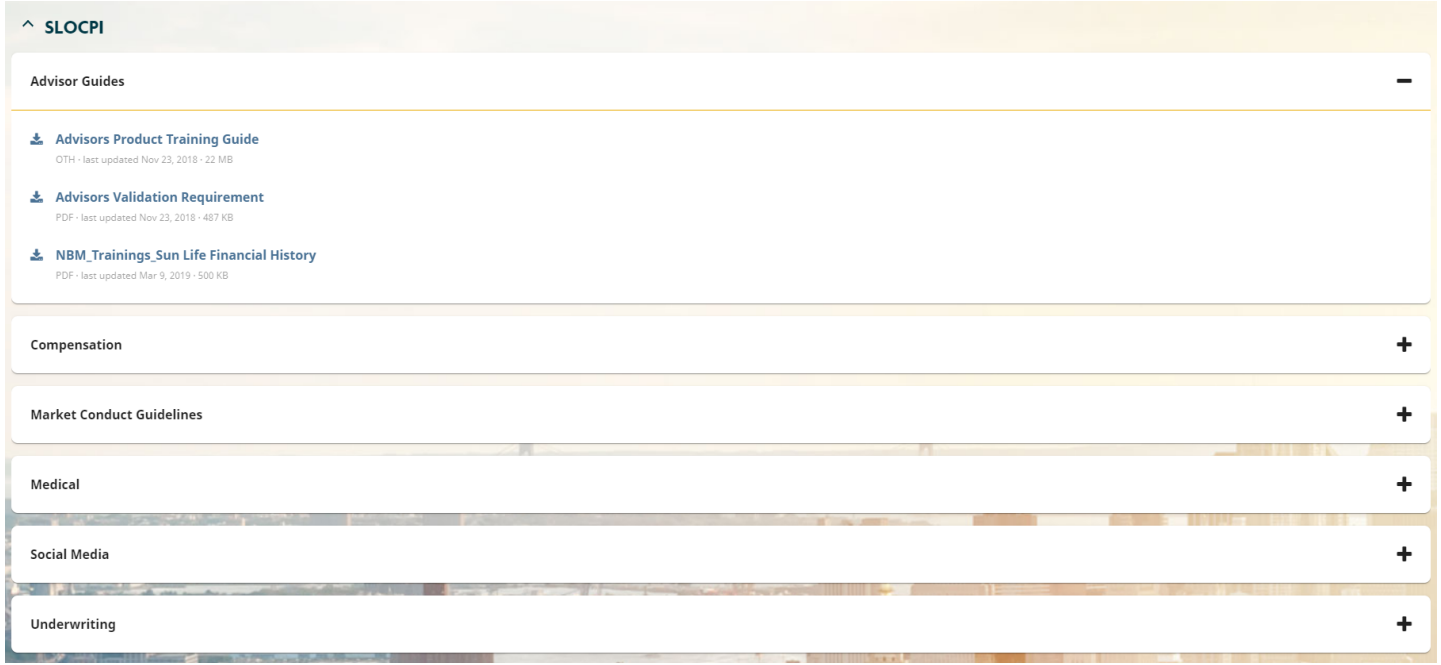
Sales Support will highlight 3 items, and one is reserved for SLOCPI

Announcements: News Feed



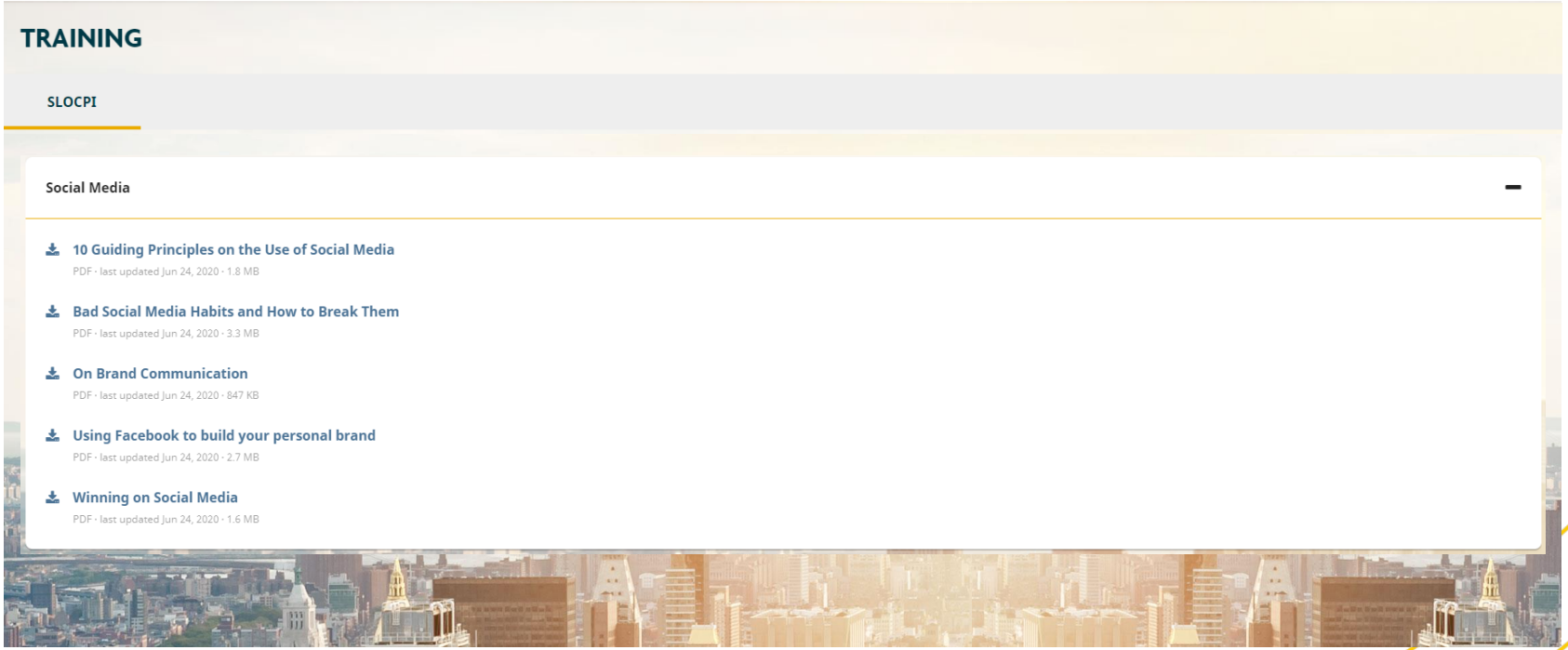
Users can filter announcements based on business

Training: SLOCPI Guides



Training: Social Media Guides

Advisor Home Office > Training > SLOCPI > Social Media



Downloads

DOWNLOADS

SLOCPI | SLAMCI | App centre

FORMS AND CHECKLISTS

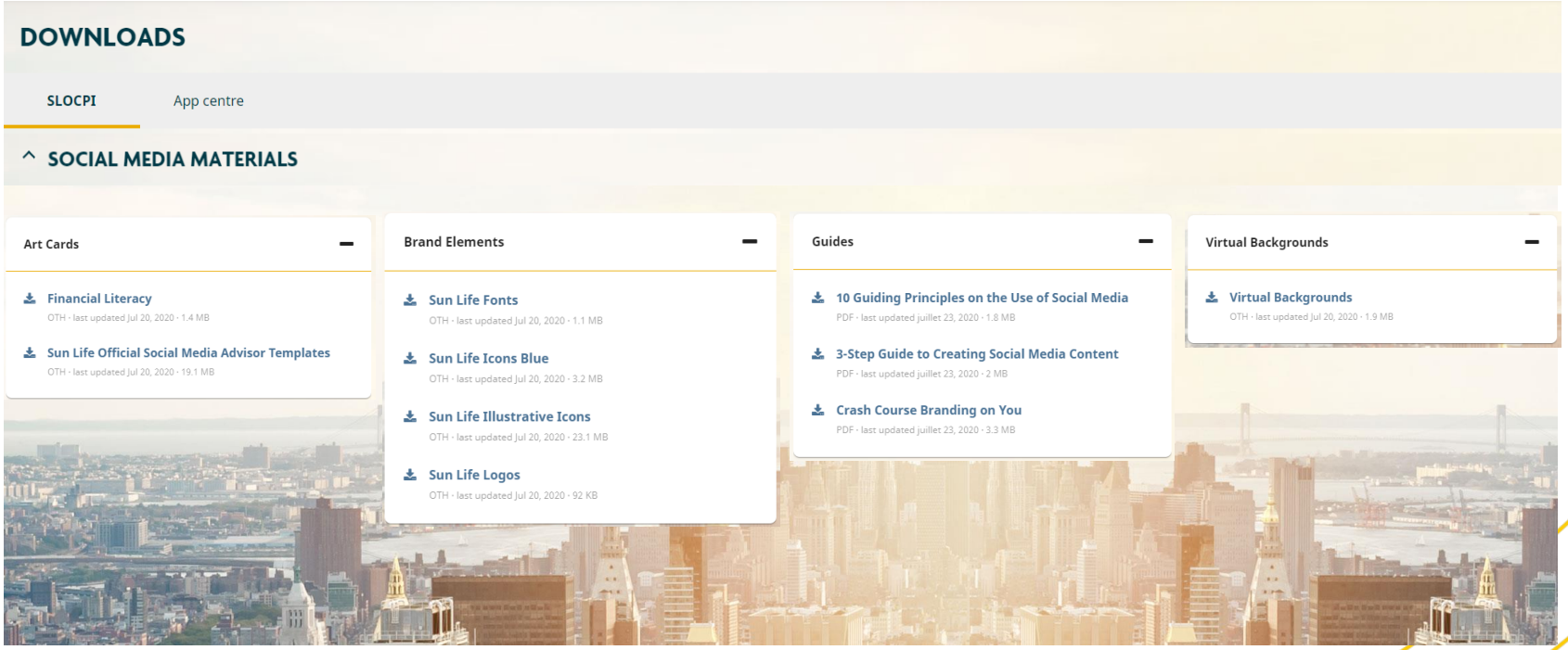
- New Business and Underwriting
- Policy Servicing
- Preneed
- Taxation

PRODUCT MATERIALS

- Group Solution
- Institutional Brochures
- Product Brochures

Downloads: Social Media Materials

Advisor Home Office > Downloads > SLOCPI > Social Media Materials



Feedback

Digital Distribution

FEEDBACK AND INQUIRIES

Feature suggestions, navigation & business process inquiries, general feedback, usage tips, app announcements

Email

PHIL-DigitalDistribution@sunlife.com

Facebook

Agency Sales (SLOCPI) Facebook Group

ATS

ADVISOR TECHNOLOGY SUPPORT

TECHNICAL SUPPORT

Login and access concerns, loading issues, submission issues, upgrade assistance, troubleshooting

Email

PHIL-ATS@sunlife.com

Facebook group

ATS Facebook Group

Hotlines

8555-8888 local 3000

8849-9439