

Appointment/Change of Endowment Beneficiary



In this form, *you* and *your* refer to the policy owner while *we*, *us*, *our* and *the Company* refer to Sun Life of Canada (Philippines), Inc., a member of the Sun Life Financial group of companies.

PRINT clearly. Use BLACK ink.

1 General Information

Policy Owner (Last Name, First Name, M.I.)
Life Insured (Last Name, First Name, M.I.) (Complete if the life insured is not the policy owner)
Policy Number(s)

2 Appointment/Change of Beneficiary - Endowment Benefit

With reference to the above-numbered policy or policies issued by the Company, you

- appoint endowment beneficiary/ies change endowment beneficiary/ies presently nominated

to receive proceeds due if the life insured is living on the endowment date(s) as follows:

Primary Endowment Beneficiary/ies

Name (Last Name, First Name, M.I.)		Birthdate (day/month/year)	
Relationship to the life insured <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Others, specify _____		Country of Birth	Citizenship/s
Permanent Residence Address (no., street, municipality/city, province, country, zip code) P.O. Box is not acceptable			
Present Residence Address (no., street, municipality/city, province, country, zip code) P.O. Box is not acceptable			
Home Phone (country code, area code & tel. no.)	Work Phone (country code, area code & tel. no.)	Mobile Phone (country code & mobile no.)	E-mail Address

Contingent Endowment Beneficiary/ies (in the event of death of all primary beneficiary/ies)

Name (Last Name, First Name, M.I.)	Birthdate (day/month/year)	Relationship to the life insured
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Reminders:

- Any designated beneficiary who is a minor at the time of pay-out of insurance proceeds and those minors who are designated as beneficiaries are subject to the laws protecting minor.
- If for Sun Heritage, indicate if for College Education Benefits and Graduation Gift Benefit, Contingent Education Benefit.

3 Acknowledgement and Agreement

Changes to Material Facts or Personal Information

By affixing your signature below, you acknowledge and agree that you shall notify the Company in writing and provide the required details or documents within thirty (30) days for any changes in your personal/material information which results in the Company being subject to tax reporting and withholding requirements under local and/or foreign laws applicable to you or your property. There is a change in your personal/material information if there is a change in your contact number(s), place of residence, citizenship, or other circumstance as defined under applicable laws.



3 Acknowledgement and Agreement (continuation)

Data Privacy

By signing below, you consent, as well as affirm that you are authorized to give consent on behalf of the beneficiary, for the collection, processing, use, storage and destruction of personal and sensitive personal information and any information related to you and your assignee and/or beneficiary in relation to the subject insurance policy as well as its sharing, transfer and/or disclosure to any of the Company's branches, subsidiaries, affiliates, advisors and representatives, industry associations and third parties such as but not limited to outsourced service providers, external auditors, and local and foreign regulatory authorities in relation to any matter including but not limited to those involving anti-money laundering and tax monitoring, review and reporting, statistical and risk analysis, provision of any products, service, or offers made through mail/email/fax/SMS/telephone, customer satisfaction surveys; compliance with court and other lawful orders and requirements. You and your assignee and/or beneficiary hold the Company free and harmless from any liability that may arise from any transfer, disclosure, processing, collection, use, storage or destruction of said information.

This section must be signed by the policy owner . The witness should be a disinterested person and his/her address should be provided.

Signature of Policy Owner X	Printed Name
Signature of Witness X	Printed Name
Address of Witness (no., street, municipality/city, province, country, zip code)	
Place of Signing	Date of Signing (day/month/year)

Signature of Irrevocable Endowment Beneficiary, if any X	Printed Name
Signature of Witness X	Printed Name
Address of Witness (no., street, municipality/city, province, country, zip code)	
Place of Signing	Date of Signing (day/month/year)

4 For Company Use Only

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