

# Application for Reduced Sales Load



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 investor/company's authorized signatory, while *we*, *us*, *our*, and the *Company* refer to SLAMCI.

**Purpose of the Form:**

This form is a request to avail of the reduced front-end sales load privilege. Please refer to Section C (Terms and Conditions) for more details on this privilege. Front-end zero load investments are not eligible for application.

**IMPORTANT NOTES:**

You must accomplish and submit the completed form through any of our Client Service Centers or our email at RequestSLAMCI@sunlife.com. For inquiries, please send an email to 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 Investor

Last Name \_\_\_\_\_

First Name \_\_\_\_\_ M.I. \_\_\_\_\_

**B Details of Pooled Account**

List in the table below all Funds, both personal and individual accounts of your qualified family members (spouse, children, parents, siblings, grandparents, and grandchildren).

2a. Account Number	2b. Full Account Name (Last Name, First Name, and M.I.)	2c. Relationship to Investor	2d. Investor's Signature

**C Terms and Conditions**

You agree that your application is subject to SLAMCI's approval and the following terms and conditions:

- a. You must invest at least PHP 5,000,000.00 within twelve (12) months from date of application;
- b. This enrollment shall cover all accounts listed in this application for a specified time;
- c. You cannot redeem all of the invested funds unless condition (a.) has been satisfied;
- d. Failure to satisfy condition (a.) authorizes SLAMCI to redeem shares from your investment as payment for regular sales load charges;
- e. Unqualified investment accounts will not be included in the computation of the PHP 5,000,000.00 pooled amount; and,
- f. SLAMCI has the right to modify or terminate at any time the grant of this privilege to its investors.

**D Signatures**

**Compliance with Data Privacy Act of 2012 (Republic Act No. 10173)**

You acknowledge that SLAMCI, its employees, duly authorized representatives, related companies, third party service providers, and vendors shall process and share your information with any person or organization to (i) service this account, (ii) process transactions and enforce this contract, and (iii) pursue its legitimate and lawful rights and interests and other purposes allowed under privacy laws and regulations.

Your personal data shall be retained throughout the existence of your account(s) and/or until expiration of the retention limit set by laws and regulations from account closure and the period set for destruction or disposal of records. You certify that you have read, understood, and agreed with the declarations and authorizations above, including Sun Life's privacy policy found in <https://apps.sunlife.com.ph/privacy>.

3. Printed Name and Signature of Investor	4. Date of Signing (e.g. 08-AUG-2008)	Day	Month	Year
5. Printed Name and Signature of Co-Investor	6. Date of Signing (e.g. 08-AUG-2008)	Day	Month	Year
7. Printed Name and Signature of MF Representative	8. Date of Signing (e.g. 08-AUG-2008)	Day	Month	Year

9. Would you like to receive personalized communications and product offers from SLAMCI, Sun Life of Canada (Philippines), Inc. (SLOCPI)?  
 Yes                      No

**For Office Use Only**

10. Date Received	11. Time Received	12. Receiving Department/Office
13. Remarks		