

Maturity Benefit Claim Requirements



Purpose of this checklist:

This checklist serves as a guide when claiming for maturity benefits.

IMPORTANT REMINDERS

Please take note of the following:

- Submit certified true copies only.
 - ☑ Photocopies, except for IDs, are not acceptable.
 - ☑ Photocopies of IDs may be submitted provided the original copies are presented for verification.
- Documents submitted to Sun Life of Canada (Philippines), Inc., will not be returned.
- Always attach a photocopy of the Claimant's valid ID (any government-issued ID with photo and signature) with the basic claim requirements.
- We may ask for additional documents after reviewing the requirements you submitted.

A Basic Claim Requirements

Claimant's Statement [form provided by SLOCPI] to be completed by designated primary beneficiary (-ies) or by authorized signatory, if beneficiary is a company

Special Instruction: *One Claimant's Statement per beneficiary*

B Conditional Requirements (Submit appropriate requirements as indicated below.)

<p>If beneficiary is the spouse</p> <p><input type="checkbox"/> Marriage Certificate issued by the Philippine Statistics Authority (<i>original</i>)</p>	<p>If beneficiary is a minor (<i>below 18 years old</i>)</p> <p><input type="checkbox"/> Birth Certificate of the minor issued by the Philippine Statistics Authority (<i>original</i>)</p> <p><input type="checkbox"/> Notarized Affidavit of Guardianship [form provided by SLOCPI] if parent or other party is claiming on behalf of the minor</p> <p>Additional documents required if the approved claim exceeds PHP500,000.00:</p> <p><input type="checkbox"/> Guardian's Bond approved by the court including the Summary of the Proceedings or the Petition if parent is claiming on behalf of the minor (<i>submit only upon approval of claim</i>)</p> <p><input type="checkbox"/> Letters of Guardianship approved by the court including the Summary of the Proceedings or the Petition if party other than parent is claiming on behalf of the minor (<i>submit only upon approval of claim</i>)</p>
<p>If designated beneficiary is a creditor</p> <p><input type="checkbox"/> Statement of Account if loan has not been paid in full as of date of maturity</p> <p><input type="checkbox"/> Proof of Settlement of Loan if loan has been paid in full as of date of maturity</p>	<p>If beneficiary is a corporation</p> <p><input type="checkbox"/> Corporate Secretary's Certificate indicating the name(-s), scope of authority and specimen signature(-s) of the person(-s) authorized by the company to sign the claim requirements</p> <p><input type="checkbox"/> One (1) valid ID (<i>any government-issued ID with photo and signature</i>) per authorized signatory</p> <p><input type="checkbox"/> Latest General Information Sheet (GIS) duly filed with the Securities and Exchange Commission (SEC)</p>



If beneficiary is a corporation, or an individual who is a U.S. Person or tax resident (*including a green card holder and dual citizen*), or who has a U.S. Address or U.S. phone number

- FATCA Declaration Form** [form provided by SLOCPI]
- Duly accomplished **W-8BEN** or **W-9** [form may be downloaded from the IRS website - www.irs.gov/forms-instructions]

For inquiries and concerns, please contact us at any of the following:

Email: sunlink@sunlife.com

Client Care: (+632) 8849-9888*

Toll-free (using PLDT Line): 1-800-10-SUNLIFE (7865433) outside Metro Manila

8:00 AM - 7:00 PM | Mondays - Fridays

*Calls outside the Philippines may incur international call charges.

