

## **SUN LIFE PROSPERITY CARD**

### **FREQUENTLY ASKED QUESTIONS**

#### **1. What is the Sun Life Prosperity Card?**

The Sun Life Prosperity Card is a gift card that can be used to invest in any of the peso-denominated Sun Life Prosperity Funds. You may purchase a card for your personal use or as a gift to your loved ones.

#### **2. What are the variants of the Prosperity Card?**

The Prosperity Card has two variants:

- PHP 1,000 (new) – Available as a physical card. It comes in white and has a light gray sticker indicating the denomination.
- PHP 5,000 – Available as a physical card. It comes in white and has a yellow sticker indicating the denomination<sup>1</sup>.

#### **3. Who can purchase a Prosperity Card?**

Filipino citizens who are at least 18 years old.

#### **4. How can I purchase a Prosperity Card?**

Simply visit any **Sun Life Client Service Center**, accomplish a Purchase Form, and submit one (1) Primary ID. Please refer to the list of Sun Life Client Service Centers offering Prosperity Cards.

#### **5. How do I invest using the Prosperity Card?**

You may invest online, through our Client Service Centers, or through our advisors.

- **Online**
  - For **new** investors:
    - Go to [moneyforlife.com.ph](http://moneyforlife.com.ph) for the Client Discovery Tool.
    - Once prompted, enter the Card Number and Security Code under Payment Details.
    - To get the Security Code, scratch off the lower right box at the back of the card.
  - For **existing** investors:
    - Log-in or create an account with My Sun Life Client Portal (available on [sunlife.com.ph](http://sunlife.com.ph)) or the Sun Life PH mobile app.
    - Once prompted, enter the Card Number and Security Code under Payment Details.
    - To get the Security Code, scratch off the lower right box at the back of the card.
- **Client Service Centers/ advisors**
  - For **new** investors:
    - Present the following requirements: One (1) primary ID, a photocopy of the Prosperity Card, and an accomplished Account Opening Form.
    - Make sure to write "Prosperity Card" and the Card Number on page 3 of the form (Section E - Initial Investment Details, item 65- Payment Details).
  - For **existing** investors:
    - Present the following requirements: One (1) primary ID, a photocopy of the Prosperity Card, and a Request for Additional Investment Form. Make sure to write

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<sup>1</sup> Prosperity Cards purchased before 2019 do not have stickers.

“Prosperity Card” and the Card Number on Page 1 of the form (Section B - Additional Investment Details, item 4a - Payment Details).

Fund Name (1)	Sales Load:	<input type="checkbox"/> Front-End Load*	<input type="checkbox"/> Back-End Load**	<input type="checkbox"/> Others
Money Market Fund	Amount Paid:	<input checked="" type="checkbox"/> PHP <input type="checkbox"/> USD		1 0 0 0 0 0
	Amount in Words:	One thousand pesos only		
<b>Payment Details</b> <input type="checkbox"/> Cash <input type="checkbox"/> Check (To be processed only upon receipt of cleared funds. To apply for the waived clearing privilege, fill out the Request for Waived Clearing by MF Representative form.) Check No.: Drawee Bank:				
<input type="checkbox"/> Direct Deposit to SLAMCI Bank Account Name of the Bank: <input type="checkbox"/> Transfer from Sun Life Insurance Policy / Plan Agreement <input type="checkbox"/> Telegraphic Transfer <input checked="" type="checkbox"/> Others Prosperity Card - 2018 PYF3 0000 0001				

Transactions received before 12nn will be processed within the same business day. Those received beyond the cut-off will be processed on the next business day.

**6. Does the Prosperity Card have an expiry date?**

No, the Prosperity Card does not have an expiry date. However, we strongly encourage you to activate the card immediately upon purchase or receipt so you may begin your investment journey right away and to avoid loss or theft.

**7. Is the Prosperity Card reloadable?**

No. The Prosperity Card has a fixed value of either Php 1,000 or Php 5,000 and cannot be reloaded.

**8. Is the Prosperity Card refundable or convertible to cash?**

No, the Prosperity Card is not refundable or convertible to cash. It can only be used to invest in peso-denominated Sun Life Prosperity Funds.

**9. Can the Prosperity Card be given to a minor?**

Yes, the card can be given to a minor. To begin investing in the child’s name, the parent/legal guardian may act as the principal investor/trustee.

**10. What should I do if my Prosperity Card is lost or stolen?**

Report lost or stolen cards immediately by calling (632) 849-9888. Lost or stolen cards shall not be replaced. Clients, however, may still invest the amount upon presentation of the Site Receiving Form and ID of the buyer. For your protection, we encourage you to activate the Prosperity Card immediately upon purchase or receipt. Please also keep a copy of the Site Receiving Form.

The Sun Life Prosperity Card is available in the following Sun Life Client Service Centers:

## **Metro Manila**

### **Bonifacio Global City**

G/F Sun Life Centre, 5th Avenue corner Rizal Drive, Bonifacio Global City, 1634 Taguig City  
(02) 555-8888 local 5916

### **Binondo**

G/F ETY Building, Quintin Paredes Street, Binondo, Manila  
(02) 771-5892

### **Greenhills**

1/F BTTC Centre, 288 Ortigas Avenue corner Roosevelt Street, Greenhills, San Juan City  
(02) 719-3996

### **Lepanto (Makati)**

G/F BA Lepanto Building, 8747 Paseo de Roxas, Makati City  
(02) 813-7229

### **Quezon City**

G/F Orcel II Building, 1611 Quezon Avenue, Quezon City  
(02) 448-6515

## **Luzon**

### **Palawan**

2/F Eastville City Walk, National Highway, Brgy. San Pedro, Puerto Princesa City  
(048) 434-1420

## **Visayas**

### **Bacolod**

2/F Jenter Building, Lacson Street corner 20th Street, Bacolod City  
(034) 458-6750

### **Cebu**

G/F The Globe Tower, Panay Road corner Samar Loop, Cebu Business Park, Cebu City  
(032) 415-8540 to 43

### **Dumaguete**

Room 201 EBT Building, Rizal Avenue, Dumaguete City  
(035) 225-7165

**Iloilo**

G/F Paragon Square Building, Donato Pison Avenue, Brgy. San Rafael, Mandurriao, Iloilo City  
(033) 328-7106 and (033) 328-7104

**Kalibo**

2F Rizajoles Laserna Building, 1274 C. Laserna Street, Poblacion, Kalibo, Aklan  
(036) 268-6325

**Tacloban**

2/F JGC Building, Marasbaras, Tacloban City  
(053) 530-0557

**Tagbilaran**

2/F SLAO Building, C.P. Garcia corner Tamblot Street, Tagbilaran City  
(038) 501-9995

**Mindanao****Butuan**

2F D & V Plaza Holdings, JC Aquino Avenue, Butuan City  
(085) 815-5177

**Cagayan de Oro**

6/F New Daw Hotel Plus, Macahambus Velez Street, Cagayan de Oro City  
(088) 859 3031 and (088) 859 3021

**Davao**

G/F Plaza de Luisa Commercial Complex, Ramon Magsaysay Street, Davao City  
(082) 227-7635

**General Santos**

3/F Santanna Building, Santiago Blvd., Brgy. Lagao, General Santos City  
(083) 553-0829 and (083) 553-0856

**Koronadal**

Unit 205 & 206, 2/F Elan Building. Gen. Santos Drive corner Roxas Street, Koronadal City  
(083) 228-2826

**Matina IT Park**

G/F Luisa Building, Matina IT Park, McArthur Highway, Davao City  
(082) 298-3768 and (082) 298-3769

**Tagum**

2/F Tan Building, Apokon Road, Tagum City  
(084) 655-9559