

Sun Life Prosperity Funds Auto-Invest Amendment Form



Sun Life Centre, 5th Avenue, corner Rizal Drive, Bonifacio Global City, 1634 Taguig City, Philippines
For inquiries, please call (632)849-9888 or e-mail sunlink@sunlife.com

I. Account Holder Information

MF Account No:

Individual/Joint Account

Corporate or Trust Name

Full Name of Investor/Trustee (LAST NAME, FIRST NAME, MIDDLE NAME/FULL COMPANY NAME) (include co-investor's name, if any)

Mobile Number

E-mail

II. Bank Account Information (Current)

Bank

Branch

Account Number

Account Type

Current Account

Savings Account

III. Amendment Request

I hereby request for the amendment of the selected fund below:

Sun Life Prosperity Balanced Fund

Sun Life Prosperity Philippine Equity Fund

Sun Life Prosperity Bond Fund

Sun Life Prosperity Philippine Stock Index Fund

Sun Life Prosperity GS Fund

Other Funds

Sun Life Prosperity Peso Starter Fund
(Formerly Sun Life Prosperity Money Market Fund)

Change Fund to

(Minimum investment amount: Php 1,000)

Change subscription amount from to

(Every 5th or 20th of the month)

Change subscription schedule from to

(Account type, Account number)

Change enrolled Bank Account from to *

For bank account amendments, please accomplish the bank auto-debit form.

For Individual/Joint Accounts

Signature of Principal Investor

Date

DD/MM/YYYY

Signature of Co-Investor (if any)

Date

DD/MM/YYYY

For Corporate Accounts

Authorized Signatory 1

Date

DD/MM/YYYY

Authorized Signatory 2

Date

DD/MM/YYYY

Terms and Conditions

1. This form must be submitted at least seven (7) calendar days prior to your existing subscription date. Otherwise, amendment requests will be effective on the next subscription schedule.
2. Terms and conditions of the Auto-Invest Enrollment Form apply.

