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Company Information

SEC Registration No.: A200014495

Company Name: SUN LIFE FINANCIAL PLANS, INC.

Industry Classification: J68140 Company Type: Stock Corporation

Document Information

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FOR THE YEAR 2023

STOCK CORPORATION

GENERAL INSTRUCTIONS:

- I. FOR USER CORPORATION: THIS GIS SHOULD BE SUBMITTED WITHIN THIRTY (30) CALENDAR DAYS FROM THE DATE OF THE ANNUAL STOCKHOLDERS' MEETING. DO NOT LEAVE ANY ITEM BLANK. WRITE "N.A." IF THE INFORMATION REQUIRED IS NOT APPLICABLE TO THE CORPORATION OR "NONE" IF THE INFORMATION IS NON-EXISTENT. IF THE ANNUAL STOCKHOLDERS' MEETING IS HELD ON A DATE OTHER THAN THAT STATED IN THE BY-LAWS, THE GIS SHALL, BE SUBMITTED WITHIN THIRTY (30) CALENDAR DAYS AFTER THE ELECTION OF THE DIRECTORS, TRUSTEES AND OFFICERS OF THE CORPORATION AT THE ANNUAL MEMBERS' MEETING.
- IF NO MEETING IS HELD, THE CORPORATION SHALL SUBMIT THE GIS NOT LATER THAN JANUARY 30 OF THE FOLLOWING YEAR. HOWEVER, SHOULD AN ANNUAL STOCKHOLDERS' MEETING BE HELD THEREAFTER, A NEW GIS SHALL BE SUBMITTED/FILED.
- 3. THIS GIS SHALL, BE ACCOMPLISHED IN ENGLISH AND CERTIFIED AND SWORN TO BY THE CORPORATE SECRETARY OF THE CORPORATION.
- 4. THE SEC SHOULD BE TIMELY APPRISED OF RELEVANT CHANGES IN THE SUBMITTED INFORMATION AS THEY ARISE. FOR CHANGES RESULTING FROM ACTIONS THAT AROSE BETWEEN THE ANNUAL MEETINGS, THE CORPORATION SHALL SUBMIT AMENDED GIS CONTAINING THE NEW INFORMATION TOGETHER WITH A COVER LETTER SIGNED THE CORPORATE SECRETARY OF THE CORPORATION. THE AMENDED GIS AND COVER LETTER SHALL BE SUBMITTED WITHIN SEVEN (7) DAYS AFTER SUCH CHANGE OCCURRED OR BECAME EFFECTIVE.
- 5. SUBMIT FOUR (4) COPIES OF THE GIS TO THE RECEIVING SECTION AT THE SEC MAIN OFFICE, OR TO SEC SATELLITE OFFICES OR EXTENSION OFFICES. ALL COPIES SHALL UNIFORMLY BE ON A4 OR LETTER-SIZED PAPER. THE PAGES OF ALL COPIES SHALL USE ONLY ONE SIDE
- 6. ONLY THE GIS ACCOMPLISHED IN ACCORDANCE WITH THESE INSTRUCTIONS SHALL BE CONSIDERED AS HAVING BEEN FILED.
- THIS GIS MAY BE USED AS EVIDENCE AGAINST THE CORPORATION AND ITS RESPONSIBLE DIRECTORS/OFFICERS FOR ANY VIOLATION OF EXISTING LAWS, RULES AND REGULATIONS

SUN LIFE FINANCIAL PLANS, INC. SUN LIFE FINANCIAL PLANS, INC. SEC REGISTRATION NUMBER: A200014495 December 31 December 31 CORPORATE TAX IDENTIFICAT NUMBER (TIN) LAST FRIDAY OF MAY ACTUAL DATE OF ANNUAL MEETING: O1 March 2023 COMPLETE PRINCIPAL OFFICE ADDRESS: SUN LIFE CENTRE, 5TH AVENUE CORNER RIZAL DRIVE BONIFACIO GLOBAL CITY, TAGUIG CITY OFFICIAL E-MAIL ADDRESS SUN LIFE CENTRE, 5TH AVENUE CORNER RIZAL DRIVE BONIFACIO GLOBAL CITY, TAGUIG CITY OFFICIAL E-MAIL ADDRESS SUN LIFE CENTRE, 5TH AVENUE CORNER RIZAL DRIVE BONIFACIO GLOBAL CITY, TAGUIG CITY OFFICIAL E-MAIL ADDRESS SUN LIFE CENTRE, 5TH AVENUE CORNER RIZAL DRIVE BONIFACIO GLOBAL CITY, TAGUIG CITY OFFICIAL E-MAIL ADDRESS ALTERNATE E-MAIL ADDRESS OFFICIAL MOBILE NUMBER NAME OF EXTERNAL AUDITOR & ITS SIGNING PARTNER: NAVARRO AMPER & CO./DELOITTE TOUCHE TOHMATSU - NINA CECILIA S. FELISMINO SEC ACCREDITATION NUMBER (II applicable): SEC ACCREDITATION NUMBER (II applicable): SEC ACCREDITATION NUMBER (II applicable): SEC ACN. 103737-SEC 8581-9000			PLEASE PRINT LEGIBLY	**********		
BUSINESS/TRADE NAME: SUN LIFE FINANCIAL PLANS, INC. SEC REGISTRATION NUMBER: A200014495 December 31 December 31 December 31 COPPORATE TAX IDENTIFICAT NUMBER (TIN) LAST FRIDAY OF MAY 208-551-659-000 WEESTIT_URL ADDRESS SUN LIFE CENTRE, 5TH AVENUE CORNER RIZAL DRIVE BONIFACIO GLOBAL CITY, TAGUIG CITY OFFICIAL E-MAIL ADDRESS SUN LIFE CENTRE, 5TH AVENUE CORNER RIZAL DRIVE BONIFACIO GLOBAL CITY, TAGUIG CITY OFFICIAL E-MAIL ADDRESS ALTERNATE E-MAIL ADDRESS SUN LIFE CENTRE, 5TH AVENUE CORNER RIZAL DRIVE BONIFACIO GLOBAL CITY, TAGUIG CITY OFFICIAL E-MAIL ADDRESS ALTERNATE E-MAIL ADDRESS OFFICIAL MOBILE NUMBER SUN LIFE CENTRE, 5TH AVENUE CORNER RIZAL DRIVE BONIFACIO GLOBAL CITY, TAGUIG CITY OFFICIAL E-MAIL ADDRESS ALTERNATE E-MAIL ADDRESS OFFICIAL MOBILE NUMBER ALTERNATE MOBILE NUMBER SUN LIFE CENTRE, 5TH AVENUE CORNER RIZAL DRIVE BONIFACIO GLOBAL CITY, TAGUIG CITY OP99 - 991778 O997 - 991778 O917 - 8024021 NAME OF EXTERNAL AUDITOR & ITS SIGNING PARTNER: NAVARRO AMPER & CO_/DELOTTE TOUCHE TOH MATSU - NINA CECILIA S. FELISMING PRIMARY PURPOSE/ACTIVITY/INDUSTRY PRESENTLY ENGAGED IN: SELLING PRE-NEED PLANS SEC AN. 103737-SEC BOSGRAPHICAL CODE: NA *********************************	CORPORATE NAME:	200000000000000000000000000000000000000				DATE REGISTERED:
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OFFICIAL E-MAIL ADDRESS Sunlife_sec_communications@sunlife.com Sunlife_sec_communications@sunlife.com Sunlife_sec_communications@sunlife.com NAME OF EXTERNAL AUDITOR & ITS SIGNING PARTNER: NAVARRO AMPER & CO./DELOITTE TOUCHE TOHMATSU- NINA CECILIA S. FELISMINO PRIMARY PURPOSE/ACTIVITY/INDUSTRY PRESENTLY ENGAGED IN: SEC_ACREDITATION NUMBER (II ** ** ** ** ** ** ** ** ** ** ** ** *	COMPLETE BUSINESS ADDRESS:					FAX NUMBER:
Sun life of Canada (Philippines), inc. Parent Company Sun life of Canada (Philippines), inc. Sun life of Canada (Philippines), inc. Sun life asset Management Company, inc. Sun life asset Management Company, inc. Sun life asset Management Company, inc. Sun life prosperity Dynamic Fund, inc. Sun life centre, 5th ave. cor. rizal Drive, Bonifact Global city, Taguig City Sun life centre, 5th ave. cor. rizal Drive, Bonifact Global city, Taguig City Sun life centre, 5th ave. cor. rizal Drive, Bonifact Global city, Taguig City Sun life centre, 5th ave. cor. rizal Drive, Bonifact Global city, Taguig City Sun life centre, 5th ave. cor. rizal Drive, Bonifact Global city, Taguig City Sun life centre, 5th ave. cor. rizal Drive, Bonifact Global city, Taguig City Sun life centre, 5th ave. cor. rizal Drive, Bonifact Global city, Taguig City Sun life centre, 5th ave. cor. rizal Drive, Bonifact Global city, Taguig City Sun life centre, 5th ave. cor. rizal Drive, Bonifact Global city, Taguig City	SUN LIFE CENTRE, 5TH /	AVENUE CORNER R	IZAL DRIVE BONIFACIO GLO	BAL CITY	, TAGUIG CITY	8849-9727
NAME OF EXTERNAL AUDITOR & ITS SIGNING PARTNER: NAVARRO AMPER & CO./DELOFITE TOUCHE TOHMATSU - NINA CECILIA S. FELISMINO PRIMARY PURPOSE/ACTIVITY/INDUSTRY PRESENTLY ENGAGED IN: SELLING PRE-NEED PLANS PRE-NEED INTERCOMPANY AFFILIATIONS PARENT COMPANY SEC REGISTRATION NO. ADDRESS SUN LIFE OF CANADA (PHILIPPINES), INC. A199911619 SEC REGISTRATION NO. ADDRESS SUN LIFE ASSET MANAGEMENT COMPANY, INC. A199918034 SUN LIFE CENTRE, STH AVI. COR. RIZAL DRIVE, BONIFACE GLOBAL CITY, TAGUIG CITY SUN LIFE PROSPERITY DYNAMIC FUND, INC. CS201215846 SUN LIFE CENTRE, STH AVI. COR. RIZAL DRIVE, BONIFACE GLOBAL CITY, TAGUIG CITY SUN LIFE PROSPERITY DYNAMIC FUND, INC. CS201215846 SEC AN. 103737-SEC 8581-9000 REGEORAPHICAL CODE: N.A. 2/F SUN LIFE CENTRE STH AVI. COR. RIZAL DRIVE, BONIFACE GLOBAL CITY, TAGUIG CITY SUN LIFE CENTRE, STH AVI. COR. RIZAL DRIVE, BONIFACE GLOBAL CITY, TAGUIG CITY SUN LIFE CENTRE, STH AVE. COR. RIZAL DRIVE, BONIFACE GLOBAL CITY, TAGUIG CITY SUN LIFE CENTRE, STH AVE. COR. RIZAL DRIVE, BONIFACE GLOBAL CITY, TAGUIG CITY SUN LIFE CENTRE, STH AVE. COR. RIZAL DRIVE, BONIFACE GLOBAL CITY, TAGUIG CITY SUN LIFE CENTRE, STH AVE. COR. RIZAL DRIVE, BONIFACE GLOBAL CITY, TAGUIG CITY SUN LIFE CENTRE, STH AVE. COR. RIZAL DRIVE, BONIFACE GLOBAL CITY, TAGUIG CITY SUN LIFE CENTRE, STH AVE. COR. RIZAL DRIVE, BONIFACE GLOBAL CITY, TAGUIG CITY SUN LIFE CENTRE, STH AVE. COR. RIZAL DRIVE, BONIFACE GLOBAL CITY, TAGUIG CITY SUN LIFE CENTRE, STH AVE. COR. RIZAL DRIVE, BONIFACE GLOBAL CITY, TAGUIG CITY	OFFICIAL E-MAIL ADDRESS	ALTERNAT	E E-MAIL ADDRESS	MAIL ADDRESS OFFICIAL MOBILE NUMBER		ALTERNATE MOBILE NUMBER
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e. Reinsurance Brokers f. Holding Companies g. Holding Companies g. Holding Companies h. Pre-need Companies c. providing a registered office, business address or accommodation, correspondence or administrative address for a company, a partnership or any other legal person or arrangement d. acting as (or arranging for another person to act as) a nominee shareholder f				1	
f. Holding Companies g. Holding Company Systems h. Pre-need Company Systems h. Pre-need Company Systems h. Wutual Benefit Association j. All Other Persons and entities supervised and/or regulated by the Insurance Commission (IC) a. Securities Dealers d. acting as (or arranging for another person to act as) a nominee shareholder for another person or arrangement d. acting as (or arranging for another person to act as) a nominee shareholder for another person c. Securities Salesman 7. Persons who provide any of the following services: a. managing of client money, securities or other assets b. management of bank, savings or securities accounts b. management of bank, savings or securities accounts c. c. organization of contributions for the creation, operation or management of companies c. c. organization of contributions for the creation, operation or management of juridical persons or arrangements d. creation, operation or management of juridical persons or arrangements of the creation, operation or management of juridical persons or arrangements of companies d. creation, operation or management of juridical persons or arrangements of companies d. creation, operation or management of juridical persons or arrangements of companies d. creation, operation or management of juridical persons or arrangements of companies d. creation, operation or management of juridical persons or arrangements, and buying and selling business entities d. creation, operation or management of juridical persons or arrangements, and buying and selling business entities d. creation, operation or management of juridical persons or arrangements d. creation, operation or management of juridical persons or arrangements d. creation, operation or management of juridical persons or arrangements d. creation, operation or management of juridical persons or arrangements d. creation, operation or management of juridical persons or arrangements d. creation, operation or management of juridical per		d. Professional Reinsurers			
g. Holding Company Systems h. Pre-need Companies i. Mutual Benefit Association j. All Other Persons and entities supervised and/or regulated by the Insurance Commission (IC) 3. a. Securities Dealers b. Securities Brokers c. Securities Salesman c. Securities Salesman d. Investment Houses e. Investment Agents and Consultants f. Trading Advisors g. Other entities managing Securities or rendering similar services h. Mutual Funds or Open-end Investment Companies j. Common Trust Funds or Issuers and other similar entities k. Transfer Companies and other similar entities l. Other entities administering or otherwise dealing in currency, commodities or financial derivatives based there on m. Entities administering or otherwise dealing in valuable objects n. Entities administering or otherwise dealing in cash Substitutes and other similar monetary instruments or property supervised and/or regulated by the Securities and Exchange Commission (SEC) B. Has the Corporation complied with the requirements on Customer Due Diligence (CDD) or Know Your Customer (KYC), record-keeping, and submission of reports		e. Reinsurance Brokers	l		
h. Pre-need Companies c. providing a registered office, business address or accommodation, correspondence or administrative address for a company, a partnership or any other legal person or arrangement		f. Holding Companies	l		relation to other juridical persons
i. Mutual Benefit Association j. All Other Persons and entities supervised and/or regulated by the Insurance Commission (IC) 3. a. Securities Dealers d. acting as (or arranging for another person to act as) b. Securities Brokers d. Investment Houses a nominee shareholder for another person to act as) c. Securities Salesman 7. Persons who provide any of the following services: a. managing of client money, securities or other assets b. management of bank, savings or securities accounts b. management of bank, savings or securities accounts c. Close-end Investment Companies j. Common Trust Funds or Issuers and other similar entities k. Transfer Companies and other similar entities l. Other entities administering or otherwise dealing in currency, commodities or financial derivatives based there on m. Entities administering of otherwise dealing in cash Substitutes and other similar monetary instruments or property supervised and/or regulated by the Securities and Exchange Commission (SEC) B. Has the Corporation complied with the requirements on Customer Due Diligence (CDD) or Know Your Customer (KYC), record-keeping, and submission of reports Person was commodation, correspondence or administrative address for a company, a partnership or any other legal person or arrangement legal person or ar		g. Holding Company Systems	2000		
J. All Other Persons and entities supervised and/or regulated by the Insurance Commission (IC) 3.					
legal person or arrangement	255		l		- ^ ^ ^ ^ ^ ^ ^ ^ ^ ^ ^ ^ ^ ^ ^ ^ ^ ^ ^
3. a. Securities Dealers d. acting as (or arranging for another person to act as) a nominee shareholder for another person to act as) a nomine shareholder for another person to act as) a nominee shareholder for another person to act as) a nomine shareholder for another person to act as) a nominee shareholder for another person to act as) a nominee shareholder for another per			l		
a. Securities Dealers b. Securities Brokers c. Securities Salesman d. Investment Houses e. Investment Agents and Consultants f. Trading Advisors g. Other entities managing Securities or rendering similar services h. Mutual Funds or Open-end Investment Companies i. Close-end Investment Companies j. Common Trust Funds or Issuers and other similar entities k. Transfer Companies and other similar entities l. Other entities administering or otherwise dealing in currency, commodities or financial derivatives based there on m. Entities administering or otherwise dealing in reash Substitutes and other similar monetary instruments or property supervised and/or regulated by the Securities and Exchange Commission (SEC) d. acting as (or arranging for another person to act as) a nominee shareholder for another person 7. Persons who provide any of the following services: a. managing of client money, securities or other assets b. management of bank, savings or securities accounts c. organization of contributions for the creation, operation or management of juridical persons or arrangements, and buying and selling business entities 8. None of the above Describe nature of business: Selling Pre-need Plans nature of business: (CDD) or Know Your Customer (KYC), record-keeping, and submission of reports	-	Insurance Commission (IC)	l		legal person or arrangement
b. Securities Brokers		A DE DE L	-		
C. Securities Salesman d. Investment Houses e. Investment Agents and Consultants f. Trading Advisors g. Other entities managing Securities or rendering similar services h. Mutual Funds or Open-end Investment Companies i. Close-end Investment Companies j. Common Trust Funds or Issuers and other similar entities k. Transfer Companies and other similar entities l. Other entities administering or otherwise dealing in currency, commodities or financial derivatives based there on m. Entities administering or otherwise dealing in valuable objects n. Entities administering or otherwise dealing in cash Substitutes and other similar monetary instruments or property supervised and/or regulated by the Securities and Exchange Commission (SEC) 7. Persons who provide any of the following services: a. managing of client money, securities or other assets b. management of bank, savings or securities accounts c. organization of contributions for the creation, operation or management of juridical persons or arrangements, and buying and selling business entities 8. None of the above Describe nature of business: Selling Pre-need Plans nature of business: Entitles administering or otherwise dealing in currency, commodities or financial derivatives based there on m. Entities administering or otherwise dealing in currency, commodities or financial derivatives based there on m. Entities administering or otherwise dealing in currency, commodities or financial derivatives based there on m. Entities administering or otherwise dealing in currency, commodities or financial derivatives based there on m. Entities administering or otherwise dealing in currency, commodities or financial derivatives based there on m. Entities administering or otherwise dealing in currency, commodities or financial derivatives based there on m. Entities administering or otherwise dealing in currency, commodities or financial derivatives based there on m. Entities administering or otherwise dealing in currency, commodities or financial derivatives based ther	5555				
d. Investment Houses	0755		_	_	a nominee snareholder for another person
e. Investment Agents and Consultants f. Trading Advisors g. Other entities managing Securities or rendering similar services h. Mutual Funds or Open-end Investment Companies i. Close-end Investment Companies j. Common Trust Funds or Issuers and other similar entities k. Transfer Companies and other similar entities l. Other entities administering or otherwise dealing in currency, commodities or financial derivatives based there on m. Entities administering or otherwise dealing in valuable objects n. Entities administering or otherwise dealing in cash Substitutes and other similar monetary instruments or property supervised and/or regulated by the Securities and Exchange Commission (SEC) b. management of bank, savings or securities accounts c. organization or contributions for the creation, operation or management of juridical persons or arrangements, and buying and selling business entities 8. None of the above Describe nature of business: Selling Pre-need Plans nature of business: (SEC) B. Has the Corporation complied with the requirements on Customer Due Diligence (CDD) or Know Your Customer (KYC), record-keeping, and submission of reports	ш	c. Securities Salesman	7.		Persons who provide any of the following services:
 e. Investment Agents and Consultants f. Trading Advisors g. Other entities managing Securities or rendering similar services h. Mutual Funds or Open-end Investment Companies i. Close-end Investment Companies j. Common Trust Funds or Issuers and other similar entities k. Transfer Companies and other similar entities l. Other entities administering or otherwise dealing in currency, commodities or financial derivatives based there on m. Entities administering or otherwise dealing in valuable objects n. Entities administering or otherwise dealing in cash Substitutes and other similar monetary instruments or property supervised and/or regulated by the Securities and Exchange Commission (SEC) B. Has the Corporation complied with the requirements on Customer Due Diligence (CDD) or Know Your Customer (KYC), record-keeping, and submission of reports b. management of bank, savings or securities accounts c. organization of contributions for the creation, operation or management of juridical persons or arrangements, and buying and selling business entities 8. None of the above Describe nature of business: 		d. Investment Houses	п		managing of client money securities or other assets
G. Trading Advisors G. Other entities managing Securities or rendering similar services H. Mutual Funds or Open-end Investment Companies G. Close-end Investment Companies G. Common Trust Funds or Issuers and other similar entities G. K. Transfer Companies and other similar entities G. I. Other entities administering or otherwise dealing in currency, commodities or financial derivatives based there on G. Entities administering or otherwise dealing in valuable objects G. Transfer Companies G. Corganization of contributions for the creation, operation or management of juridical persons or arrangements, and buying and selling business entities G. Corganization of contributions for the creation, operation or management of juridical persons or arrangements, and buying and selling business entities G. Corganization of contributions for the creation, operation or management of bank, savings or securities accounts G. Corganization of contributions for the creation, operation or management of bank, savings or securities accounts G. Corganization of contributions for the creation, operation or management of business entities G. Corganization of contributions for the creation, operation or management of companies G. Corganization of contributions for the creation, operation or management of companies G. Corganization of contributions for the creation, operation or management of bank, savings or securities accounts	0.000			4	a managing of circle money, accuraces of other assets
□ g. Other entities managing Securities or rendering similar services □ h. Mutual Funds or Open-end Investment Companies □ i. Close-end Investment Companies □ j. Common Trust Funds or Issuers and other similar entities □ k. Transfer Companies and other similar entities □ l. Other entities administering or otherwise dealing in currency, commodities or financial derivatives based there on □ m. Entities administering of otherwise dealing in valuable objects □ n. Entities administering or otherwise dealing in cash Substitutes and other similar monetary instruments or property supervised and/or regulated by the Securities and Exchange Commission (SEC) □ B. Has the Corporation complied with the requirements on Customer Due Diligence (CDD) or Know Your Customer (KYC), record-keeping, and submission of reports □ c. organization of contributions for the creation, operation or management of juridical persons or arrangements, and buying and selling business entities □ d. creation, operation or management of juridical persons or arrangements, and buying and selling business entities □ None of the above □ Describe nature of business: □ Selling Pre-need Plans	10000		п	1	management of bank, savings or securities accounts
h. Mutual Funds or Open-end Investment Companies c. Organization of contributions for the creation, operation or management of companies j. Common Trust Funds or Issuers and other similar entities k. Transfer Companies and other similar entities l. Other entities administering or otherwise dealing in currency, commodities or financial derivatives based there on m. Entities administering of otherwise dealing in valuable objects n. Entities administering or otherwise dealing in cash Substitutes and other similar monetary instruments or property supervised and/or regulated by the Securities and Exchange Commission (SEC) B. Has the Corporation complied with the requirements on Customer Due Diligence (CDD) or Know Your Customer (KYC), record-keeping, and submission of reports C. organization of contributions for the creation, operation or management of juridical persons or arrangements, and buying and selling business entities Describe nature of business: Selling Pre-need Plans Selling			-		
i. Close-end Investment Companies j. Common Trust Funds or Issuers and other similar entities k. Transfer Companies and other similar entities l. Other entities administering or otherwise dealing in currency, commodities or financial derivatives based there on m. Entities administering of otherwise dealing in valuable objects n. Entities administering or otherwise dealing in cash Substitutes and other similar monetary instruments or property supervised and/or regulated by the Securities and Exchange Commission (SEC) B. Has the Corporation complied with the requirements on Customer Due Diligence (CDD) or Know Your Customer (KYC), record-keeping, and submission of reports operation or management of companies d. creation, operation or management of juridical persons or arrangements, and buying and selling business entities Describe nature of business: Selling Pre-need Plans nature of business: Selling Pre-need Plans nature of business: CNO		1 3 T - 7 H - 7 T - 7 T - 7 H - 7 T			c. organization of contributions for the creation.
k. Transfer Companies and other similar entities		i. Close-end Investment Companies			** TO THE TOTAL STATE OF THE PARTY OF THE PA
□ 1. Other entities administering or otherwise dealing in currency, commodities or financial derivatives based there on □ m. Entities administering of otherwise dealing in valuable objects □ n. Entities administering or otherwise dealing in cash Substitutes and other similar monetary instruments or property supervised and/or regulated by the Securities and Exchange Commission (SEC) □ B. Has the Corporation complied with the requirements on Customer Due Diligence (CDD) or Know Your Customer (KYC), record-keeping, and submission of reports □ Commodities or financial derivatives based there on business entities □ None of the above □ Describe nature of business: □ Describe nature of business: □ Selling Pre-need Plans □ Describe nature of business: □ Describe nature of		j. Common Trust Funds or Issuers and other similar entities	l		
commodities or financial derivatives based there on m. Entities administering of otherwise dealing in valuable objects n. Entities administering or otherwise dealing in cash Substitutes and other similar monetary instruments or property supervised and/or regulated by the Securities and Exchange Commission (SEC) B. Has the Corporation complied with the requirements on Customer Due Diligence (CDD) or Know Your Customer (KYC), record-keeping, and submission of reports business entities None of the above Describe nature of business: Selling Pre-need Plans nature of business: Ves No		k. Transfer Companies and other similar entities		0	f. creation, operation or management of juridical
 m. Entities administering of otherwise dealing in valuable objects n. Entities administering or otherwise dealing in cash Substitutes and other similar monetary instruments or property supervised and/or regulated by the Securities and Exchange Commission (SEC) B. Has the Corporation complied with the requirements on Customer Due Diligence (CDD) or Know Your Customer (KYC), record-keeping, and submission of reports 		1. Other entities administering or otherwise dealing in currency,	l		persons or arrangements, and buying and selling
n. Entities administering or otherwise dealing in cash Substitutes and other similar monetary instruments or property supervised and/or regulated by the Securities and Exchange Commission (SEC) B. Has the Corporation complied with the requirements on Customer Due Diligence (CDD) or Know Your Customer (KYC), record-keeping, and submission of reports	5353	commodities or financial derivatives based there on			business entities
and other similar monetary instruments or property supervised and/or regulated by the Securities and Exchange Commission (SEC) B. Has the Corporation complied with the requirements on Customer Due Diligence (CDD) or Know Your Customer (KYC), record-keeping, and submission of reports		m. Entities administering of otherwise dealing in valuable objects	8.□		None of the above
and/or regulated by the Securities and Exchange Commission (SEC) B. Has the Corporation complied with the requirements on Customer Due Diligence (CDD) or Know Your Customer (KYC), record-keeping, and submission of reports • Yes • No		n. Entities administering or otherwise dealing in cash Substitutes	Describ	e.	Selling Pre-need Plans
(SEC) B. Has the Corporation complied with the requirements on Customer Due Diligence (CDD) or Know Your Customer (KYC), record-keeping, and submission of reports • Yes • No		and other similar monetary instruments or property supervised	nature (of	SSE 1
B. Has the Corporation complied with the requirements on Customer Due Diligence (CDD) or Know Your Customer (KYC), record-keeping, and submission of reports • Yes • No			busines	s:	
(CDD) or Know Your Customer (KYC), record-keeping, and submission of reports					
		(2) 1일 [2] 10 [2] 이 보면 있는데, 10 [2] 1	mission o	of	reports Yes No

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STOCK CORPORATION

PLEASE PRINT LEGIBLY ------

CORPORATE NA	AME:		S	UN LIFE FINANCIAL PLANS, INC.						
			CAPITA	L STRUCTURE						
AUTHORIZED CA	PITAL STOCK					9				
		TYPE OF SHARES *	NUMBER OF SHARES	PAR/STAT	TED VALUE	AMOUNT (PhP (No. of shares X Par/Sta				
		common preferred	3,000,000 2,000,000		25.00 25.00	75,000,000.00 50,000,000.00				
		TOTAL	5,000,000		TOTAL P	125,000,000.00	0			
SUBSCRIBED CAP	ITAL									
FILIPINO	NO. OF STOCK- HOLDERS	TYPE OF SHARES *	NUMBER OF SHARES	NUMBER OF SHARES IN THE HANDS OF THE PUBLIC **	PAR/STATED VALUE	AMOUNT (PhP)	% OF OWNERSHIP			
	9	common		0	25.00	100.00	0.009			
		TOTAL	4	TOTAL	TOTAL P	100.00				
FOREIGN (INDICATE BY NATIONALITY)	NO. OF STOCK- HOLDERS	TYPE OF SHARES *	NUMBER OF SHARES	NUMBER OF SHARES IN THE HANDS OF THE PUBLIC **	PAR/STATED VALUE	AMOUNT (PhP)	% OF OWNERSHIP			
Dutch Chinese	1	common preferred common	2,999,995 2,000,000 1	0 0 0	25.00 25.00 25.00	74,999,875.00 50,000,000,00 25.00	60.00% 			
Percentage of For	reign Equity :	TOTAL	4,999,996	TOTAL	TOTAL P	124,999,900.00				
				TOTAL	SUBSCRIBED P	125,000,000.00				
PAID-UP CAPIT	AL									
FILIPINO	NO. OF STOCK- HOLDERS	TYPE OF SHARES *	NUMBER OF SHARES	PAR/STAT	TED VALUE	AMOUNT (PhP)	% OF OWNERSHIP			
	9	common	4	25.00		100.00	0.009			
		TOTAL	4		TOTAL P	100.00				
FOREIGN (INDICATE BY NATIONALITY)	NO. OF STOCK- HOLDERS	TYPE OF SHARES *	NUMBER OF SHARES	PAR/STATED VALUE		AMOUNT (PhP)	% OF OWNERSHIP			
Dutch Chinese	1	common preferred common	2,999,995 2,000,000 1	25.00 25.00 25.00		74,999,875.00 50,000,000.00 25.00	60.009 40.009 0.009			
100.00 %		TOTAL	4,999,996		TOTAL P	124,999,900.00				
				TOTAL PAID-U		125,000,000.00				

** Other than Directors, Officers, Shareholders owning 10% of outstanding shares.

* Common, Preferred or other classification

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NOTE: USE ADDITIONAL SHEET IF NECESSARY

STOCK CORPORATION

PLEASE PRINT LEGIBLY -----CORPORATE NAME: SUN LIFE FINANCIAL PLANS, INC. DIRECTORS / OFFICERS TAX IDENTIFICATION STOCK NAME/CURRENT RESIDENTIAL ADDRESS NATIONALITY BOARD GENDER INCR OFFICER EXEC. COMM. HOLDER 1. CHIA-LING CHOU aka LUCY CHOU ACCG/M N C Chairman and RPT/M 2. BENEDICTO C. SISON N M Y N N 3. MARIA SACHIKO A. PANG N M President N 4. FRANCISCO S.A. SANDEJAS ACCG/C and N N RPT/M 5. OSCAR S. REYES ACCG/M N 1 N and RPT/C 6. MARIA TERESA A. CO Compliance. Officer, Money Laundering. N N N N Officer and Data Protection Officer 7. JOEL O. BUNGABONG Internal N N N N Auditor 8. ANNA KATRINA C. KABIGTING-IBERO Corporate N N N N Secretary 9. HOPE JAN C. CANDIDO Assistant N N Corporate N Secretary 10. LEO CARL T. CHIN N N N Treasurer N 11. 12. 13.

INSTRUCTION:

15.

FOR SEX COLUMN, PUT "F" FOR FEMALE. "M" FOR MALE.

FOR BOARD COLUMN, PUT "C" FOR CHARMAN, "W" FOR MEMBER, "I" FOR INDEPENDENT DIRECTOR FOR INC'R COLUMN, PUT "Y" IF AN INCORPORATOR, "N" IF NOT.

FOR STOCKHOLDER COLUMN, PUT "Y" IF A STOCKHOLDER, "N" IF NOT

FOR OFFICER COLUMN, INDICATE PARTICULAR POSITION IF AN OFFICER, FROM VP UP INCLUDING THE POSITION OF THE TREASURER, SECRETARY, COMPLIANCE OFFICER AND/OR ASSOCIATED PERSON.

FOR EXECUTIVE COMMITTEE, INDICATE "C" IF MEMBER OF THE COMPENSATION COMMITTEE, "A" FOR AUDIT COMMITTEE; "IN" FOR NOMINATION GIS 500CK (v.2020)AND ELECTION COMMITTEE. ADDITIONALLY WRITE "C" AFTER SLASH IF CHARMAN AND "M" IF MEMBER.

STOCK CORPORATION

		==== PLEAS	E PRINT LEGIBLY :			***
CORPORATE NAME:	SUN LIFE F	INANCIAL PLA	ANS, INC.			
TOTAL NUMBER OF STOCKHOLDERS:	6		NO. OF STOCKHOLDE	ERS WITH 100 OR	MORE SHARES EACH:	1
TOTAL ASSETS BASED ON LATEST AUDITED FINA	NCIAL STATE	MENTS:	Php 4,910,503,424			
		STOCKHOL	DER'S INFORMATIO	ON		
		SHARES	SUBSCRIBED			
NAME, NATIONALITY AND CURRENT RESIDENTIAL ADDRESS	ТУРЕ	NUMBER	AMOUNT (PhP)	% OF OWNER- SHIP	AMOUNT PAID (PhP)	TAX IDENTIFICATION NUMBER
SUN LIFE OF CANADA (PHILIPPINES), INC. Dutch 2/F Sun Life Centre, 5th Ave. cor. Rizal Drive,	Common Preferred	2,999,995 2,000,000	74,999,875.00 50,000,000.00	144656000	74,999,875.00 50,000,000.00	204- 962-522
Bonifacio Global City, Taguig City	TOTAL	4,999,995	124,999,875,00			
2. CHIA-LING CHOU aka LUCY CHOU	Common	1	25.00	0.00%	25.00	
	TOTAL	1	25.00			
3. BENEDICTO C. SISON	Common	1	25.00			
t	TOTAL	1	25,00	0.00%	25.00	
4. MARIA SACHIKO A. PANG	Common	1	25.00			+
у				0.00%	25.00	
	TOTAL	1	25.00			
5. FRANCISCO S.A. SANDEJAS	Common	1	25.00	0.00%	25.00	
	TOTAL	1	25.00			
6. OSCAR S. REYES	Common	1	25.00	0.00%	25.00	
ı,	TOTAL	1	25.00	(300,000)	25,00	
7. Nothing Follows						
TOTAL AMOUNT OF	SUBSCRIBE		125,000,000.00	-	125,00	00,000.00

INSTRUCTION: SPECIFY THE TOP 20 STOCKHOLDERS AND INDICATE THE REST AS OTHERS

Note: For PDTC Naminee included in the list, please indicate further the beneficial owners owning more than 5% of any class of the company's voting securities. Attach separate sheet, if necessary.

GIS_STOCK (v.2020) Page 5

STOCK CORPORATION

		PLEA	SE PRINT LEGIBLY	/ ========		
CORPORATE NAME:	SUN LIFE	FINANCIAL P	LANS, INC.			
TOTAL NUMBER OF STOCKHOLDERS:			NO. OF STOCKHOL	DERS WITH 100 OR	MORE SHARES EACH:	
TOTAL ASSETS BASED ON LATEST AUDITED FINA	ANCIAL STATE	EMENTS:				
		STOCKHO	LDER'S INFORMAT	FION		
		SHAR	ES SUBSCRIBED			
NAME, NATIONALITY AND CURRENT RESIDENTIAL ADDRESS	ТУРЕ	NUMBER	AMOUNT (PhP)	% OF OWNER- SHIP	AMOUNT PAID (PhP)	TAX IDENTIFICATION NUMBER
8.						
9.						
10.						
11						
12.						
13.						
14.						
TOTAL AMOUNT OF	SUBSCRIBE	D CAPITAL				
	and the same of th	TOTAL A	MOUNT OF PAID-	JP CAPITAL		

INSTRUCTION: SPECIFY THE TOP 20 STOCKHOLDERS AND INDICATE THE REST AS OTHERS

Note: For PDTC Nominee included in the list, please indicate further the beneficial owners owning more than 5% of any class of the company's voting securities. Attach separate sheet, if necessary.

STOCK CORPORATION

************		PLEA	ASE PRINT LEGIBLY	Y ========		====
CORPORATE NAME:		FINANCIAL P				
TOTAL NUMBER OF STOCKHOLDERS:			NO. OF STOCKHOL	DERS WITH 100 OR	MORE SHARES EACH:	
TOTAL ASSETS BASED ON LATEST AUDITED FINA	ANCIAL STATE	EMENTS:				
		STOCKHO	DLDER'S INFORMA	TION		
		SHAR	ES SUBSCRIBED			
NAME, NATIONALITY AND CURRENT RESIDENTIAL ADDRESS	ТУРЕ	NUMBER	AMOUNT (PhP)	% OF OWNER- SHIP	(PhP)	TAX IDENTIFICATION NUMBER
15.						
16.						
17.						
18.						
19.						
20.						
21. OTHERS (Indicate the number of the remaining stockholders)						
TOTAL AMOUNT OF	SUBSCRIBE	ED CAPITAL				1,,,
		TOTAL /	AMOUNT OF PAID-	UP CAPITAL		

INSTRUCTION: SPECIFY THE TOP 20 STOCKHOLDERS AND INDICATE THE REST AS OTHERS

Note: For PDTC Nomince included in the list, please indicate further the beneficial owners owning more than 5% of any class of the company's voting securities. Attach separate sheet, if necessary.

STOCK CORPORATION

		PLEASE PRINT	W 10-20-20-20 V			
CORPORATE NAME:						
		SUN LI	FE FINANC	IAL PLANS, INC	•	
1. INVESTMENT OF C FUNDS IN ANOTHI		AM	AMOUNT (PhP) DATE O		DATEO	F BOARD RESOLUTION
1.1 STOCKS			N.A.			N.A.
1.2 BONDS/COM by Private Co	MERCIAL PAPER (Issued rporations)		N.A.			N.A.
1.3 LOANS/CREE	DITS/ ADVANCES		N.A.			N.A.
1.4 GOVERNMEN	T TREASURY BILLS	Government Se	curities: Php	199,039,900		N.A.
1.5 OTHERS		In Mutual Fun Investment in Tru				N.A.
	ORPORATE FUNDS IN ACT POSES (PLEASE SPECIFY:)	IVITIES UNDER IT	S	DATE OF BOA RESOLUTIO	900000000	DATE OF STOCKHOLDERS RATIFICATION
	N.A			N.A.		N.A.
3. TREASURY SHARE	S N.A.		NO. OF SHARES			% AS TO THE TOTAL NO. OF SHARES ISSUE
				N.A.		N.A.
. UNRESTRICTED/U	NAPPROPRIATED RETAIN	ED EARNINGS AS C	OF END OF L	AST FISCAL YEA	R : Php (1,	022,046,334)
5. DIVIDENDS DECLA	RED DURING THE IMMEDI	ATELY PRECEDING	G YEAR:	none		
TY	PE OF DIVIDEND		AMO	UNT (PhP)		DATE DECLARED
5.1 CASH				N.A.		N.A.
5.2 STOCK				N.A.		N.A.
5.3 PROPERTY		TOTAL P		N.A.		N.A.
6. ADDITIONAL SHAI	RES ISSUED DURING THE P	ERIOD: N.A.				9
DATE	NO. OF	SHARES	7/4		AMOU	NT
SECONDARY LICENSE, NAME OF AGENCY:	REGISTRATION WITH SEC	C AND OTHER GOV	T AGENCY:			IC
TYPE OF LICENSE/REGN.	Certificate of Incorpo	ration	N.A.		PN 2023-03-R	
DATE ISSUED:	18 September 20			3 November 2022		
DATE STARTED DPERATIONS:	01 June 2001		N.A.	A. N.A.		N.A.
DIRECTORS DURING YEAR	. COMPENSATION OF G THE PRECEDING FISCAL R (in PhP)	TOTAL NO. OF	OFFICERS	TOTAL NO. OF FILE EMPLO		TOTAL MANPOWER COMPLEMENT

NOTE: USE ADDITIONAL SHEET IF NECESSARY

I, ANNA KATRINA C. KABIGTING-IBERO Corporate Secretary of SUN LIFE FINANCIAL PLANS, INC. declare under penalty of perjury that all matters set forth in this GIS have been made in good faith, duly verified by me and to the best of my knowledge and belief are true and correct.

I hereby attest that all the information in this GIS are being submitted in compliance with the rules and regulations of the Securities and Exchange Commission (SEC) the collection, processing, storage and sharing of said information being necessary to carry out the functions of public authority for the performance of the constitutionally and statutorily mandated functions of the SEC as a regulatory agency.

I further attest that I have been authorized by the Board of Directors/Trustees to file this GIS with the SEC.

I understand that the Commission may place the corporation under delinquent status for failure to submit the reportorial requirements three (3) times, consecutively or intermittently, within a period of five (5) years (Section 177, RA No. 11232).

Done the date and place written below.



(Signature over printed name)

SUBSCRIBED AND SWORN TO before me in City of Makati on 4 2 3 2023 by affiant who personally appeared before me and exhibited to me his/her competent evidence of identity consisting of a Driver's License with No. valid until 01 September 2032.

NOTARY PUBLIC

ATTY JOEL L. VILLAL Notary Public for Makati City until 2-31-2024

Doc. No. Page No. Book No. Series of 2023.

MCLE Compliance No. VII-0007561 PTR No./9563611 / 1/03-2023 Unit 203, Carreon Bldg., 2746 Zenaida St. Poblacion, Makati City 1210

Roll No. 51808, Appointment No. M-069 IBP Lifetime No. 018385, 12-27-17, FPLM