

UNIT-LINKED APPLICATION FOR PARTIAL FUND WITHDRAWAL

IMPORTANT REMINDERS

What you should know about early full/partial withdrawal of your investment-linked policy

An insurance policy is intended to meet your long-term financial needs. Therefore, in fully or partially withdrawing a policy before its maturity date, you are losing valuable benefits. It may not be possible for you to obtain a similar level of protection on the same terms in the future.

Additional Charges/Fees

If you withdraw your investment-linked policy, fully or partially, and then buy a new investment-linked policy or other investment product, or top up on your existing investment-linked policy or other investment product, you will incur new charges. These may include:

Administration Charge

There could be a sales charge/withdrawal fee for each new policy / investment product.

Policy Fee

A policy fee is usually incurred for each policy.

Fund Switching Facility

When the fund you have bought is not meeting your initial or current investment objective, you may switch to other funds offered by the Company.

Changes in Terms and Conditions

Withdrawing your insurance policy for another policy could result in loss of specific policy features due to changes in age or health or engaging in a hazardous occupation/avocation.

Policyowner/Trustee/Assignee's Acknowledgment

Were you advised by a Servicing Intermediary to withdraw this policy?

If "yes", please ask your Servicing Intermediary to complete the "Servicing Intermediary's Acknowledgment" below.

TERMS AND CONDITIONS

- 1. A withdrawal charge may be imposed on your transaction. Please refer to your policy contract for the applicable charges.
- 2. Minimum withdrawal is PHP 10,000 or USD 200.
- 3. The account value of the fund source should not fall below PHP 10,000 or USD 200 after the withdrawal, otherwise the entire account value will be returned.

INSTRUCTIONS

- 1. If there is an irrevocable beneficiary, said beneficiary's signature is required. If the irrevocable beneficiary is a minor, the Judicial Guardian shall sign for him/her and letters of Guardianship and a Court Order authorizing the surrender must be presented.
- 2. If the assignee is a corporation, an officer of the corporation must sign for the corporation and this form must be accompanied by a certified true copy of the Board of Directors resolution authorizing the surrender and giving the executing officer the power to sign on behalf of the corporation.
- 3. In claiming the withdrawal proceeds, bring at least two identification papers such as passport, driver's license, company or professional ID.
- 4. If a representative is designated to claim the withdrawal proceeds, the following must be presented:
 - a. Authorization letter bearing the signature of the representative and signed by the policyowner; and
 - b. The representative's proper identification.

FOR SERVICING INTERMEDIARY ONLY

Servicing Intermediary's Acknowledgment

"I have explained to the Policyowner/Trustee/Assignee the alternative options available and the implications of early withdrawal of this
investment-linked policy." I have recommended the partial fund withdrawal for the following reasons:

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Servicing Intermediary's Code



		DETAILS (OF WITHDRAWAL		
	Fund Name		(√) if specified fund will be withdrawn in full		ount of Withdrawal ll not be withdrawn in full)
eason for withdrawal					
lethod of payment	☐ Crossed Check☐ Fund Transfer (f	ill-up Bank Account I		Uncrossed Check	
			CCOUNT DETAILS ne name of the Policyowner)		
Bank Name		(must be under ti		h	
Account Name					
Co-depositor's Name (if Account No.	any)				
Type of Joint Account	☐ and	and/or	Currency	Peso	US Dollar
Declarations and Agreeme	ents				
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