

# Application by the Policy Owner (Advanced Benefit/Terminal Illness/Living Benefit Rider)

In this form, **you** and **your** refer to the life insured and policy owner whose information we are processing or disclosing. **We, us, our** and **the Company** refer to Sun Life Grepa Financial, Inc., a joint venture of Sun Life and the Yuchengco Group of Companies.

You hereby request the Company for an advance of the portion of the death benefit on the policy/ies indicated herein under the provisions of the rider ticked below.

This claim is for:  
(Check appropriate box)

- Advanced Benefit for Critical Care Rider
- Terminal Illness Benefit
- Living Benefit Rider

## 1 General information

The policy/ies must be attached to this application.

Name of Life Insured (Last Name, First Name, Middle Name)		Date of Birth (month/day/year)	
Complete Address P.O. Box is not acceptable (No., Street, Village/Subdivision, Barangay, City/Municipality, Province/State, Country, Zip Code)			
Policy Number(s)			
Home Phone	Business Phone	Mobile Phone	E-mail Address
Policy Owner, if other than the Life Insured (Last Name, First Name, Middle Name)		Date of Birth (month/day/year)	

## 2 Payment Options

Indicate how you would like to receive the benefit proceeds. Kindly choose from the following options:

**Fund Transfer**

Credit to your local bank account with the following information:

Account Name \_\_\_\_\_  
 Bank Name \_\_\_\_\_  
 Routing or Serial Number\* \_\_\_\_\_  
 Swift Code Number\* \_\_\_\_\_  
 \*not applicable for Peso Account

Telegraphic Transfer (applicable only to a Claimant residing abroad)  
 Convert to US Dollar/Canadian Dollar/Others - specify currency and credit to bank account through overseas transfer with the following information:

Account Number \_\_\_\_\_  
 Bank Address \_\_\_\_\_

You agree to shoulder any bank fees and charges arising from the foregoing deposit to your account. The Company will not be liable if the remittance is credited to an erroneous bank account number.

You further agree that the company shall not be responsible nor liable whatsoever for any failure, fault or negligence on the part of the bank to deposit the proceeds to your account.

**Check** (for Peso policy only)

Send through Servicing Advisor at preferred mailing location (automatic if no instruction provided)

For pick-up at Sun Life office (specify the location): \_\_\_\_\_

For Check - Send by courier/registered mail (specify address): \_\_\_\_\_

For RCBC Demand Draft - For encashment (provide details below):

Date of Encashment: \_\_\_\_\_ RCBC Branch Address: \_\_\_\_\_

**RCBC Demand Draft** (for US Dollar policy only)

## 3 Signatures

This section must be signed by the policy owner, life insured and the appropriate persons as indicated.

By signing, you acknowledge/agree that:

- a. You agree that the Company can process your personal data to (i) implement your benefit instructions; (ii) enforce/fulfill contractual rights/obligations; (iii) improve how it develops and provides services (including development of and improvement in its systems and business processes, data analytics, automated processing, artificial intelligence, etc.); (iv) comply with applicable laws or regulations whether domestic or foreign; and (v) manage risks and pursue its legitimate interests.



**3 Signatures (continued)**

- b. You also agree that (i) the Company may disclose your personal data to its affiliates, service providers, and other third parties for processing consistent with the foregoing purposes, who shall be bound by contractual or other reasonable means to protect your personal data; (ii) that your personal data shall be retained for the duration of the policy/ies listed or existence of the related account(s) and/or upon the expiration of the retention limit set by the Company standards, laws and regulations, counted from account closure; and (iii) you have read, understood, and agree with the declarations and authorizations above, including the Company's privacy policy at <https://www.sunlifegrepa.com/privacy-policy-statement/>.
- c. Your rights include the right to be informed, access your data, and rectify errors in your data. For more information about your rights and how we protect your data, you may access our privacy policy at <https://www.sunlifegrepa.com/privacy-policy-statement/>. Should you have any concerns in relation to your rights or the processing of your personal and sensitive personal information, you may get in touch with our Data Protection Officer at [privacyconcern@sunlifegrepa.com](mailto:privacyconcern@sunlifegrepa.com).
- d. You agree that the claims application shall not be considered complete until the submission of all the required documents.

Signature of Policy owner X	Printed Full Name of Policy Owner (Last Name, First Name, Middle Name)	
Signature of Life Insured, if other than the Policy Owner X	Printed Full Name of Life Insured (Last Name, First Name, Middle Name)	
Place of Signing	Date of Signing (month/day/year)	
Signature of Irrevocable Beneficiary, if any X	Printed Full Name (Last Name, First Name, Middle Name)	
Signature of Irrevocable Beneficiary, if any X	Printed Full Name (Last Name, First Name, Middle Name)	
Signature of Irrevocable Beneficiary, if any X	Printed Full Name (Last Name, First Name, Middle Name)	
Signature of Witness X	Printed Full Name (Last Name, First Name, Middle Name)	
Place of Signing	Date of Signing (month/day/year)	
Residence Address (P.O. Box is not acceptable) No., Street, Village/Subdivision, Barangay, City/Municipality, Province/State, Country, Zip Code		
Home Phone	Work Phone	Mobile Phone

RAPA.02.21

**Authorization to disclose information**

This section must be signed by the policy owner, life insured and the appropriate persons as indicated and witnessed by an Advisor.. If that person is under eighteen (18) years of age, a parent must sign. If signed before a disinterested witness, please have this form notarized by a notary public by affixing his/her signature and official seal at the back of this form.

By signing, you acknowledge/agree that:

You authorize any physician, hospital, clinic, insurance company or other organization, institution or person, that has any record of you and/or the life insured, or your and/or the life insured's health, to give to the Company any and all information about you and/or the life insured with reference to your and/or the life insured's health and medical history and any hospitalization, advice, diagnosis, treatment, disease or ailment. A copy of this authorization shall be valid as the original.

Signature of Life Insured, if other than the Policy Owner X	Printed Full Name of Life Insured (Last Name, First Name, Middle Name)	
Place of Signing	Date of Signing (month/day/year)	
Signature of Parent, if Life Insured is under eighteen (18) years of age X	Printed Full Name of Parent (Last Name, First Name, Middle Name)	
Signature of Witness X	Printed Full Name (Last Name, First Name, Middle Name)	
Place of Signing	Date of Signing (month/day/year)	
Residence Address (P.O. Box is not acceptable) No., Street, Village/Subdivision, Barangay, City/Municipality, Province/State, Country, Zip Code		
Home Phone	Work Phone	Mobile Phone

RAPA.03.24

