

BSE Code

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POLICY NUMBER

NOTE: Fill out with block letters. Put on the tick boxes representing options.

PART I - CONTACT INFORMATION UPDATE

I agree to update my contact information records with BPI-Philam based on the details in this section.

LAST NAME

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FIRST NAME

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MIDDLE NAME

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Telephone : Residence Office

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 ex: (044) 123-4567

Mobile Phone

+ 6 3 -

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 ex: +63-900-1234567

E-Mail Address

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Preferred Mailing Address: Residence Office

House / Building / Lot No.,
Name of Street

--	--	--	--	--	--	--	--	--	--

District

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 City

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 Province

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 Zip Code

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If you want to receive e-notices in lieu of hard copy billings, accomplish the E-Notice Enrollment Form.

PART II - REQUESTED TRANSACTION/S

TOP UP Top Up Amount:

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Allocation percentage should add up to 100%. This refers to this transaction only.

Fund name	Percentage	Fund name	Percentage	Fund name	Percentage	Fund name	Percentage																
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Note: Please be reminded that: 1) Allocated fund amount to be invested shall be net of premium charge. 2) Unless directed, payment will be allocated accordingly based on your latest allocation percentages in your policy provided it satisfies the minimum requirement per fund. 3) Additional top-ups may be subjected to underwriting and future changes in cost of that may affect the account value. 4) This transaction should have the proper approval of the Company before rendering the top-up payment. 5) Fund managers and fund management charges vary across different funds. A list of the funds and their corresponding fund manager and fund management charge can be found at the back of this form, but some of these enumerated funds may not be available for your policy.

CHANGE FUND ALLOCATION

Allocation:

Fund name	Percentage	Fund name	Percentage	Fund name	Percentage	Fund name	Percentage																
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Note: This change in allocation will not affect the existing units of each of your fund and will be applied only on your future premiums and top-up payments. Fund managers and fund management charges vary across different funds. A list of the funds and their corresponding fund manager and fund management charge can be found at the back of this form, but some of these enumerated funds may not be available for your policy.

FUND SWITCH

Your instruction to switch funds may be made in terms of ONE of the following: Percentage, Amount, or Number of Units.

Percentage	Amount	Number of Units	From	To																		
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Note: While the policy is in force, fund units may be switched (or transferred) to another fund provided that: 1) The amount to be switched/transferred must not be less than the minimum amount determined by the Company and at least equal to the minimum allocation percentage in each fund. 2) The number of units to be switched will be determined by the unit price of the receiving fund. 3) The switching between funds will be subject to any other administrative rules determined by the Company from time to time. Fund managers and fund management charges vary across different funds. A list of the funds and their corresponding fund manager and fund management charge can be found at the back of this form, but some of these enumerated funds may not be available for your policy.

PART III - SIGNATURE

I/We hereby agree that should above request be approved by the Company, such request shall, from the date of such approval, amend in accordance with the terms thereof so approved the Policy to which the request refers.

Place Signed

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Date:

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Owner's Signature over Printed Name

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Irrevocable Beneficiary

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Assignee

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BSE / Witness

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PLEASE DO NOT SIGN ON A BLANK FORM.

Other Requests or Special Instructions

REMINDERS

TOP UP

You may pay additional top-up payment to increase your investment account. Please accomplish this portion and indicate the name of your chosen funds and the amount or percentage of your payment you wish to place in each fund.

CHANGE FUND ALLOCATION

You may change your existing fund allocation instruction. This will not affect the existing units of each of your fund and will be applied only on your future premiums and top-up payments.

Please indicate the name of your chosen funds and percentage of your premium to be allocated to each of your chosen funds in this section.

FUND SWITCH

While the policy is in force, fund units may be switched (or transferred) to another fund provided that:

- 1) The amount to be switched/transferred must not be less than the minimum amount determined by the Company and at least equal to the minimum allocation percentage in each fund.
- 2) The number of units to be switched will be determined by the unit price of the receiving fund.
- 3) The switching between funds will be subject to any other administrative rules determined by the Company from time to time.

FUND MANAGER AND FUND MANAGEMENT CHARGES

The Fund Management Charge (FMC) covers the expenses and other liabilities in managing the assets in the investment fund. It is deducted from the Net Asset Value of the Investment Fund as shown below. But some of these enumerated funds may not be available for your policy.

Fund	Fund Manager	Fund Management Charge
BPI-Philam Peso Bond Fund	BPI Investment Management Inc. (BIMI)	1.50% per annum
BPI-Philam Equity Index Fund	BPI Investment Management Inc. (BIMI)	1.50% per annum
BPI-Philam Growth Fund	BPI Investment Management Inc. (BIMI)	2.00% per annum
BPI-Philam Odyssey Bond Fund	BPI-Asset Management & Trust Group (AMTG)	1.00% per annum
BPI-Philam Odyssey High Conviction Equity Fund	BPI-Asset Management & Trust Group (AMTG)	2.50% per annum
BPI-Philam Odyssey Balanced Fund	BPI-Asset Management & Trust Group (AMTG)	1.50% per annum
BPI-Philam US Dollar Bond Fund	BPI-Asset Management & Trust Group (AMTG)	0.50% per annum
BPI-Philam Global Equity Fund	BPI-Asset Management & Trust Group (AMTG)	1.50% per annum
BPI-Philam Odyssey Philippine Dollar Bond Fund	BPI-Asset Management & Trust Group (AMTG)	1.25% per annum
BPI-Philam Odyssey Asia Pacific High Dividend Equity Fund	BPI-Asset Management & Trust Group (AMTG)	1.75% per annum

SIGNATURE

This request must be dated, place of signing indicated and must be signed by the Policy Owner and the irrevocable beneficiaries.

Witness portion must be duly signed by a third party of legal age.

GENERAL REQUIREMENTS

- Policy Owner's Identification Cards
- Irrevocable Beneficiary's Identification Cards

Please see additional requirements below for special circumstances:

- Policy Owner is abroad - current Special Power of Attorney duly authenticated by the Philippine Consul is required, authorizing the attorney-in-fact to execute the request.
- For representative of the Policy Owner- This may be submitted by the representative of the Policy Owner provided, it is originally signed by the Policy Owner himself and a photocopy of the Policy Owner's valid ID is presented.
- If the Owner or Assignee is a corporation, an officer of the corporation must sign for the corporation on the form, and this must be accompanied by a Corporate Secretary's Certificate and Board Resolution authorizing the change in this policy and giving the executing officer authority to sign this request on behalf of the corporation.

TO BE FILLED BY BPI PHILAM PERSONNEL

If witnessed by a BSE, indicate if:

- Original Reinstating
 Assisting/Servicing/Transferred

BSE Signature _____

BSE Code:

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Received By _____ Date _____
 Branch/Office _____
 Processed By _____ Date _____
 Branch/Office _____
 Approved By _____ Date _____
 Branch/Office _____

Documents submitted together with this application:

Notes: _____