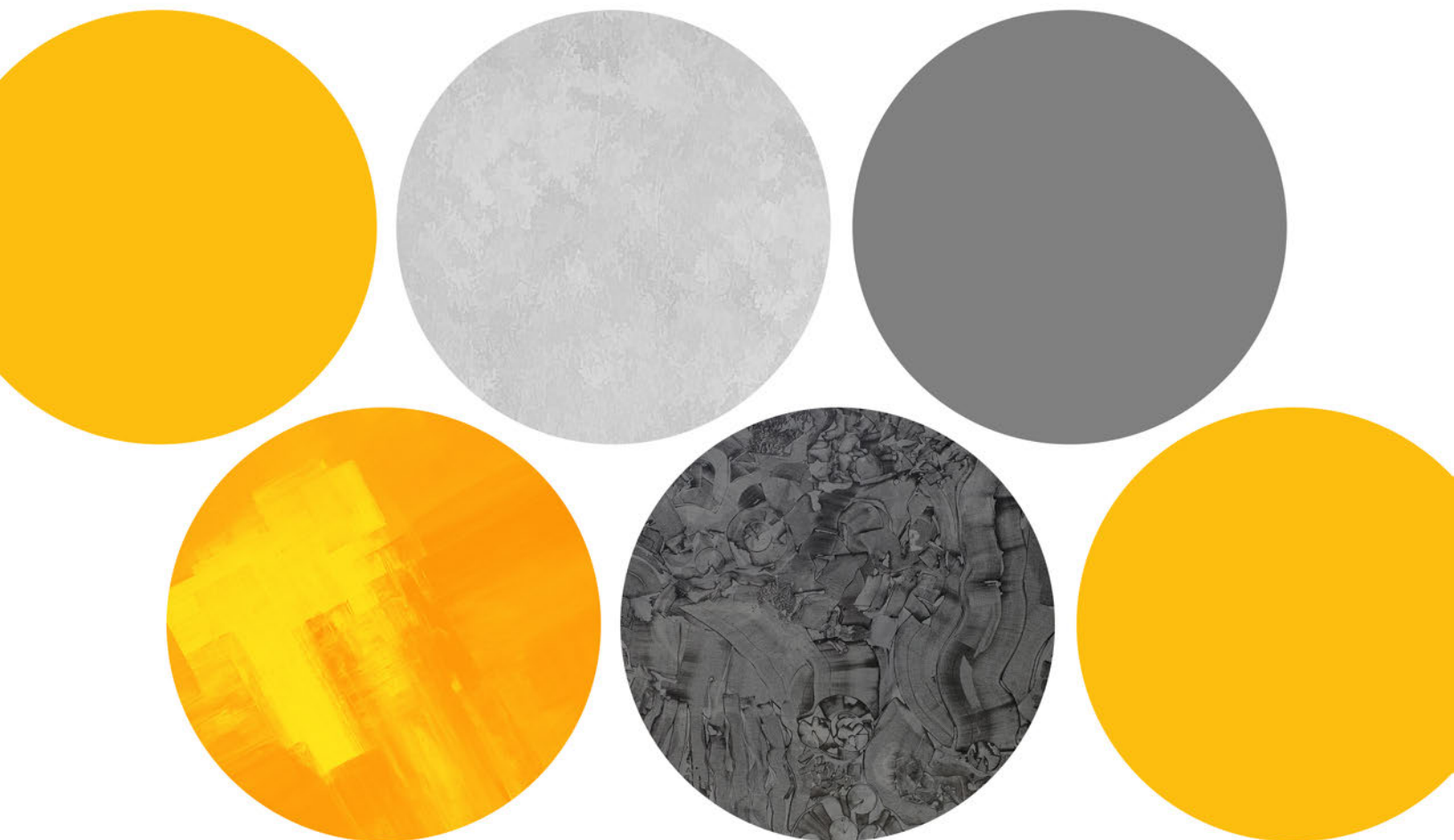


 Sun Life

FINANCIAL
ORGANIZER



NAME

DATE

ADDRESS

EMERGENCY CONTACT PERSON

EMERGENCY CONTACT NUMBER

PERSONAL DATA

YOUR NAME	YOUR SPOUSE'S NAME (IF APPLICABLE)
ADDRESS	
CITY	PROVINCE
HOME PHONE NUMBER	POSTAL CODE
E-MAIL ADDRESS(ES)	MOBILE NUMBER(S)

IDENTIFICATION NUMBERS

	YOU	YOUR SPOUSE (IF APPLICABLE)
Social Security number (SSS / GSIS)		
Pag-ibig number		
Philhealth number		
Tax identification number (TIN)		
Passport number		
Driver's license number		

CURRENT EMPLOYER

	YOU	YOUR SPOUSE (IF APPLICABLE)
Company name		
Address		
City, province, postal code		
Contact name		
Phone number		



Keep these information confidential to protect yourself from identity theft.

MEDICAL INFORMATION

	YOU	YOUR SPOUSE (IF APPLICABLE)
Health card		
Health card number		
Family doctor		
Phone		
Dentist		
Phone		
Specialist		
Phone		
Specialist		
Phone		
Specialist		
Phone		
Blood type		
Allergies		
Medications		
Other notes		

FINANCIAL ADVISOR

Name
Address
City, province, postal code
Phone number
Mobile number
E-mail address

BANK RELATIONSHIP MANAGER

Name
Address
City, province, postal code
Phone number
Mobile number
E-mail address

LEGAL ADVISOR

Name
Address
City, province, postal code
Phone number
Mobile number
E-mail address

INVESTMENT BROKER

Name
Address
City, province, postal code
Phone number
Mobile number
E-mail address

ACCOUNTANT

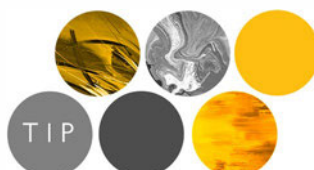
Name
Address
City, province, postal code
Phone number
Mobile number
E-mail address

OTHERS _____

Name
Address
City, province, postal code
Phone number
Mobile number
E-mail address

INSURANCE POLICIES

INSURANCE COMPANY	POLICY NUMBER	PREMIUM	FACE AMOUNT COVERAGE	ADVISOR'S NAME/NUMBER	DUE DATE
Life / Insurance (Individual / Group)					
Health Insurance					
Retirement / Plan					
Education / Plan					
Auto / Insurance					
Property / Insurance					



Indicate the date you purchased and fully paid the policy/ies. Constantly update this page to reflect changes in your policy/ies.

BANKS / FINANCIAL INSTITUTIONS

Name of institution
Branch of Account
Bank relationship manager / contact number
Phone number
Account type / number / PIN
Account type / number / PIN
Account type / number / PIN

Name of institution
Branch of Account
Bank relationship manager / contact number
Phone number
Account type / number / PIN
Account type / number / PIN
Account type / number / PIN

Name of institution
Branch of Account
Bank relationship manager / contact number
Phone number
Account type / number / PIN
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Phone number
Account type / number / PIN
Account type / number / PIN
Account type / number / PIN

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Branch of Account
Bank relationship manager / contact number
Phone number
Account type / number / PIN
Account type / number / PIN
Account type / number / PIN

Name of institution
Branch of Account
Bank relationship manager / contact number
Phone number
Account type / number / PIN
Account type / number / PIN
Account type / number / PIN



REAL ESTATE

Property address
Loan amount / monthly amortization
Bank / financial institution
Address of bank / financial institution
Contact number
E-mail address
Term / other information

Property address
Loan amount / monthly amortization
Bank / financial institution
Address of bank / financial institution
Contact number
E-mail address
Term / other information

Property address
Loan amount / monthly amortization
Bank / financial institution
Address of bank / financial institution
Contact number
E-mail address
Term / other information

Property address
Loan amount / monthly amortization
Bank / financial institution
Address of bank / financial institution
Contact number
E-mail address
Term / other information

CAR

Vehicle name / description
Loan amount / monthly amortization
Bank / financial institution
Address of bank / financial institution
Contact number
E-mail address
Term / other information

Vehicle name / description
Loan amount / monthly amortization
Bank / financial institution
Address of bank / financial institution
Contact number
E-mail address
Term / other information

BUSINESS

Business name
Loan amount / monthly amortization
Bank / financial institution
Address of bank / financial institution
Contact number
E-mail address
Term / other information

Business name
Loan amount / monthly amortization
Bank / financial institution
Address of bank / financial institution
Contact number
E-mail address
Term / other information

CONSUMER LOAN(S)

Loan description
Loan amount / monthly payment
Bank / financial institution
Address of bank / financial institution
Contact number
E-mail address
Term / other information

Loan description
Loan amount / monthly payment
Bank / financial institution
Address of bank / financial institution
Contact number
E-mail address
Term / other information



You may attach an extra piece of paper to this page to take note of your other loans.



HEALTH INSURANCE

	PHILHEALTH	HMO	HEALTH INSURANCE
Plan number			
Plan amount			
Agent / advisor contact			
Company / Institution			
Phone			
Address			
E-mail address			

MUTUAL FUNDS

	FUND 1	FUND 2	FUND 3
Account number			
Fund value			
Agent / advisor contact			
Company / Institution			
Phone			
Address			
E-mail address			

BONDS

	FUND 1	FUND 2	FUND 3
Account number			
Fund value			
Agent / advisor contact			
Company / Institution			
Phone			
Address			
E-mail address			

STOCKS

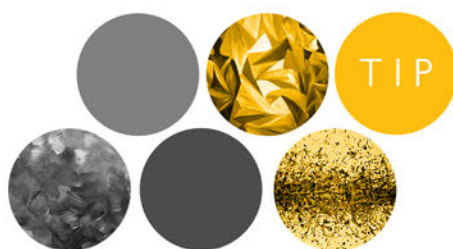
	FUND 1	FUND 2	FUND 3
Account number			
Fund value			
Agent / advisor contact			
Company / Institution			
Phone			
Address			
E-mail address			

CREDIT CARDS

	CARD 1	CARD 2	CARD 3
Type of card / Description			
Name on card			
Card number			
Customer service phone number			
Available limit			
Expiry date			
Terms / Other information			

SAFE COMBINATION

	SAFE 1	SAFE 2	SAFE 3
Home			
Institutional			



Financial information must be updated regularly. Indicate the fund value as of date.

BANK ACCOUNTS

	SAVINGS ACCOUNT	CHECKING ACCOUNT
Name of Institution		
Account number		
ATM PIN number		
ONLINE ACCOUNT	USERNAME	PASSWORD

	SAVINGS ACCOUNT	CHECKING ACCOUNT
Name of Institution		
Account number		
ATM PIN number		
ONLINE ACCOUNT	USERNAME	PASSWORD

	SAVINGS ACCOUNT	CHECKING ACCOUNT
Name of Institution		
Account number		
ATM PIN number		
ONLINE ACCOUNT	USERNAME	PASSWORD

	SAVINGS ACCOUNT	CHECKING ACCOUNT
Name of Institution		
Account number		
ATM PIN number		
ONLINE ACCOUNT	USERNAME	PASSWORD

WILLS

	YOU	YOUR SPOUSE (IF APPLICABLE)
Location of will		
Lawyer's name		
Address		
City, province, postal code		
Phone number		
E-mail address		
Executor's name		
Address		
City, province, postal code		
Phone number		
E-mail address		
Alternate executor's name		
Address		
City, province, postal code		
Phone number		
E-mail address		

MEMORIAL PLAN

	HEALTH INSURANCE
Plan number	
Plan amount	
Agent name and contact	
Company / Institution	
Address	
Phone number	
E-mail address	

LIVING WILL / POWER OF ATTORNEY

	YOU	YOUR SPOUSE (IF APPLICABLE)
Location of living will		
Name of person appointed under power of attorney(s)*		
Location of power of attorney		
Address		
City, province, postal code		
Phone number		
E-mail address		
Attorney's name		
Address		
City, province, postal code		
Phone number		
E-mail address		

*Person authorized to act in the event you are incapacitated.

TRUSTS

	FUND 1	FUND 2
Type of trust		
Trustee names		
Financial institution		
Fund amount		
Address		
Phone number		
E-mail address		

Contact name
Organization name / relationship
Address
Phone number
E-mail address

Contact name
Organization name / relationship
Address
Phone number
E-mail address

Contact name
Organization name / relationship
Address
Phone number
E-mail address

Contact name
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E-mail address

Contact name
Organization name / relationship
Address
Phone number
E-mail address

About your Partner for Life

SUN LIFE FINANCIAL

Sun Life Philippines was established in 1895 and was the first life insurance company in the Philippines. Today, it is one of the largest and most stable insurers in the country because of the mutual trust and enduring partnership it has forged with Filipinos. It has even led to Sun Life's leadership position in the industry, where it has been No. 1 for the past 11 years.

Over the years, Sun Life Philippines has evolved into a diversified financial services institution:

- **Sun Life Asset Management Company, Inc. (SLAMCI)** manages and distributes mutual funds. It is the largest non-bank asset management company in the country, with its funds and fund managers consistently recognized for excellent performance.
- **Sun Life Grepa Financial, Inc. (SLGFI)** is the bancassurance venture between Sun Life and the Yuchengco Group of Companies. It remains to be one of the top life insurance companies in the country.
- **Sun Life Investment Management and Trust Corporation (SLIMTC)**, launched in 2021, was established to provide multi-strategy local and global portfolio management services and deliver superior risk-adjusted returns for both individual and institutional investors in the Philippines.

With its meaningful history and leadership position, the company has much to live up to. But if there is one thing that its journey thus far has proven, it is that Sun Life does not shy away from challenges. Instead, it is always ready to embrace any opportunity that would lead to its purpose, and that is to help Filipinos achieve lifetime financial security and live healthier lives.

