



The Manufacturers Life Insurance Co. (Phils.), Inc.  
 LKG Tower, 6801 Ayala Avenue, 1226 Makati City  
 Tel 884-5433 Fax 884-2558

# Variable Life Policy

## Application for **FUND SWITCH /** **CHANGE OF INVESTMENT ALLOCATION OF PREMIUMS**

Policy Number \_\_\_\_\_  
 Life Insured \_\_\_\_\_

**IMPORTANT NOTICE:** This Form must be received by the Head Office by 3:00PM on a business day, otherwise it shall be deemed to be received on the next business day.

Please tick (✓) one  below:

**PART A. FUND SWITCH**

I would like to transfer fund(s) as indicated below:

FROM (SOURCE FUND)	AMOUNT/PERCENTAGE	TO (TARGET FUND)	PERCENTAGE
Peso Bond Fund		Peso Bond Fund	
Peso Stable Fund		Peso Stable Fund	
Peso Equity Fund		Peso Equity Fund	
Others		Others	
			Total = 100%

**NOTES**

- If a fund is to be fully transferred, please indicate 100% against that source fund.
- This request for Fund Switch will not be accepted unless the following conditions are met:
  - Minimum amount to be transferred from any source fund is the lower of Php10,000.00 for Peso Variable life and USD200.00 for US Dollar Variable Life or the entire fund value.
  - If Fund is not fully transferred, the minimum fund balance after Fund Switch is Php20,000.00 for Peso Variable Life and USD400.00 for US Dollar Variable Life using bid prices prior to the receipt of this request as a basis.
- Fund transfer applies to the existing units and does not affect the allocation of future premiums.
- The first two fund switches in each policy year are free. Thereafter, the fee for each transfer is Php200.00 for Peso Variable Life and USD5.00 for US Dollar Variable Life (1 form processed = 1 transfer)
- Indicate if the value is in absolute amount or percentage.

**PART B. CHANGE OF INVESTMENT ALLOCATION OF PREMIUMS** (for regular premium)

I would like all future premiums paid to be allocated as follows:

Percentage (in whole number)

- Peso Bond Fund \_\_\_\_\_
- Peso Stable Fund \_\_\_\_\_
- Peso Equity Fund \_\_\_\_\_
- Others \_\_\_\_\_
- \_\_\_\_\_

Total = 100%

**NOTES**

- Fund allocation does not affect the existing units.
- The minimum fund allocation per chosen fund is 20%.
- The first four changes of investment allocation of premiums in each policy year are free. Thereafter, the fee for each change of investment allocation of premiums is Php200.00 for Peso Variable Life and USD5.00 for US Dollar Variable Life.

Signed at \_\_\_\_\_ this \_\_\_\_\_ day of \_\_\_\_\_.

\_\_\_\_\_  
 Signature over printed name of Owner

\_\_\_\_\_  
 Signature over printed name of Agent/Witness  
 (include agent's code and unit name)

\_\_\_\_\_  
 Signature over printed name of Irrevocable Beneficiary/ies (if any)

**REQUIREMENTS:**

- Photocopy of current valid ID
- Processing Fee, if applicable

\_\_\_\_\_  
 Contact Number

Received by:

Processed by:

Approved by:

