

Attestation of the Intermediary for the Virtual Selling Process

Name of Client (Applicant Owner) :
Application Number (Application) :
Date of Meeting :
Mode of Remote Communication :

During my discussion with the Applicant Owner, I certify that:

1. I have personally presented and explained the product features and its benefits to the Applicant Owner through remote means of communication;
2. I have explained to the Applicant Owner in detail the results of the IRPQ (applicable only for unit-linked policies) as well as the investment risk of his/her chosen fund, the Sales Illustration, and the Financial Needs Analysis;
3. I have truly and accurately recorded all information provided by the Applicant Owner in the Application Form under the Applicant Owner's expressed consent and instruction; and
4. I have performed the Know-Your-Customer and Client Due Diligence procedures as required under the Anti-Money Laundering Act and related laws and have verified the identity of the Proposed Insured and/or the Applicant Owner based on the identification documents presented during our remote communication. Moreover, I confirm that (s)he or they are the same person(s) appearing in the submitted identification documents and the same person(s) who submitted the said identification documents, Application Form and Attestation letter.

Name of Intermediary

Date

Attestation of the Client for the Virtual Selling Process

Application No (Application) :
Name of Product (Policy) :
Date of Meeting :
Mode of Remote Communication :

I, _____, have discussed with _____ (Intermediary) through remote means of communication, and attest and certify that:
Name of the Applicant Owner Name of Intermediary

1. I intend to secure an insurance policy through the Intermediary who explained the features of the product and its benefits, illustrations, of the Policy including applicable riders to me;
2. The details/declarations stated in the Application Form are correct and based on the information and/or authentic documents provided by me. I personally filled out the Application Form and/or authorized the Intermediary to fill out the Application Form on my behalf;
3. The identification document (ID) submitted is a valid document and the same was secured from me by the Intermediary, and I was the one who took the selfie holding this same ID;
4. **[Applicable only for unit-linked policies]** I fully understand that I will assume all investment risks associated with this Policy;
5. **[Applicable only for Guaranteed Acceptance Endorsement]** I confirm that I have signified my consent and acknowledgment as needed in the Sales Illustration, Acknowledgment of Variability, and the Acknowledgment of Guaranteed Acceptance Endorsement and that these shall form part of the insurance contract once issued;
6. I am currently in the Philippines and agree to be bound by the declarations in the Application Form; and
7. I understand that the integrity and security of this email cannot be guaranteed over the internet, and I will send email communications only to the correct official email address of my Intermediary.

Name of Applicant Owner

Date