



**Sources of Wealth**

Refers to the source(s) of the Policy Insured's total wealth, regardless of whether any part of it will be used to transact with AXA Philippines.

Salary (PHP \_\_\_\_\_/month)  Business Income (PHP \_\_\_\_\_/month)  Others: \_\_\_\_\_ (PHP \_\_\_\_\_/month)

Sex	Date of Birth (MM/DD/YYYY)	Place of Birth	Nationality
<input type="radio"/> Male <input type="radio"/> Female			

**Residence/Present Address**

Unit/Floor Number, Building Name, Street, Barangay, City, and Province

Personal Email Address	Mobile No.	Home Phone No. (Optional)

Note: The email address must be active.

**4. Policy Owner's Details (to be filled out ONLY if different from the Policy Insured)**

These fields are required. Please do not leave them blank.

**Full Name of Policy Owner**

Last Name	First Name	Middle Name

Is the Policy Owner a US citizen or US tax resident?  Yes  No

If yes, please provide the details below:

US TIN/SSN    -   -

Is the Policy Owner or their immediate family/close associate a Politically Exposed Person (PEP)?  Yes  No

A PEP is a person who currently or previously holds a high-ranking public position in a) the Philippines, b) a foreign country, or c) an international organization. This includes roles with significant authority over public policies, operations, or use of public resources.

If yes, please indicate the PEP's position/public office below:

The section below is optional. If you need to update your personal information or contact details, please fill out only the specific fields that require changes.

Primary Occupation	Secondary Occupation

**Sources of Funds**

Refers to the source(s) of the Policy Owner's funds that will be used for transactions with AXA Philippines.

Maturing Investments (PHP \_\_\_\_\_)  Savings (PHP \_\_\_\_\_)  Others: \_\_\_\_\_ (PHP \_\_\_\_\_)

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<input type="radio"/> Male <input type="radio"/> Female			

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## 5. Change in Fund Allocation Instruction

I would like to apply for the change of the Fund Allocation Instruction indicated below.

Investment Fund Name	Allocation Percentage (%)
<b>Total</b>	<b>100%</b>

**Notes:**  
 The Policy Owner may change the allocation of any particular fund at any time while the policy is still active. The minimum allocation per fund type is 10%, as set by AXA Philippines. The total allocation across all Investment Funds must add up to 100%.  
 The Policy Owner may transfer or switch any of their units in a particular fund to another fund, subject to the company's approval. The minimum amount that can be switched is set by AXA Philippines.

## 6. Fund Switch

I would like to switch Investment Fund/s as shown below in column (i) to other Investment Fund/s as shown in column (ii).

Investment Fund Name	(i) Switch from (Units)	Investment Fund Name	(ii) Switch to Percentage

(i) Switch from: Must be written in number of units  
 (ii) Switch to: Must be written in percentage form  
 Funds for switch-out cannot be used for switch-in of units

## 7. Certification of Customary Signature (MANDATORY SECTION)

This is to certify that I am the same person who signed in the policy contract. I hereby confirm that the declarations and information therein were given by me, and I certify that they are true and complete to the best of my knowledge. Finally, the signature appearing on all the forms and valid ID/s are my customary signatures and for which reason I have signed both with my customary signatures as follows:

1.

2.

3.

## 8. Declarations and Agreement

I hereby declare and agree that:

1. The application as indicated above is based on my judgment and I did not rely on any advice provided by the Financial Advisor.
2. All information in the application whether or not written by my hand are to the best of my knowledge and belief and complete and true.
3. Any personal data of the Relevant Persons (Insured, Policy Owner, Assignee, and Irrevocable Beneficiary) collected or held by AXA Philippines, whether contained in the application or otherwise, may be utilized, stored, disclosed, transferred (whether within or outside the Philippines) to individuals, organizations, corporations, or entities as AXA Philippines may consider necessary, including but not limited to any of its affiliated or related companies, within or outside the Philippines:
  - a. to process and deal with the application;
  - b. to provide all services related to the application and promote and improve services by the Company and its affiliated companies;
  - c. to communicate with me for any purpose and/or to comply with the laws of any applicable jurisdiction including but not limited to Insurance Commission rules and regulations, the Anti-Money Laundering Act, and the Data Privacy Act.
4. If the Relevant Persons fail to provide any information requested in the application, it may result in the Company's inability to process and to deal with the application.
5. I have the right to access my personal information at any time; correct or rectify any information collected or held by AXA Philippines which are inaccurate, false, or incomplete; object in case of any unauthorized collection; erase or block information which is incomplete, outdated, or false; and such other rights as may be available under the Data Privacy Act. Such requests must be made in writing and submitted to AXA Philippines.
6. This transaction is for my existing AXA investment-linked insurance product/s indicated on the first page of this application.
7. My premium payments are allocated to charges for (a) the cost of insurance (protection benefits), (b) administration and selling fees, (c) the investment funds of my choice which is the balance amount after (a) and (b) are deducted from my premium payment.
8. The value of my investments in the funds is driven by the inherent risks of such funds, and that these investments may yield capital gains or capital losses compared to the original investment amount, depending on the performance of the market.

9. The actual investment results are not guaranteed, and the investment gains or losses are to be borne solely by me as Policy Owner.
10. The risk characteristics of my chosen investment funds have been made known to me, and I have made my fund allocation decision based on my acceptance of those risks.
11. In the event of withdrawal during the early periods of the policy, surrender charges will be applied due to unrecovered policy costs.
12. I decided to invest in the fund after carefully reviewing the **FUND HIGHLIGHT SHEET**.
13. I understand that if my requested fund switch is not aligned to my risk profile, AXA Philippines has the right to defer or decline the transaction.

**ADDITIONAL DECLARATION FOR SINGLE-PAY PLANS with income paying funds:**

14. If I am 50 years old or older, I would be subject to an even greater risk of account value depletion and policy termination due to the higher cost of insurance.
15. The addition of rider attachments to my policy could further accelerate account value depletion.
16. I read and understand the Risk Disclosure Statement section on AXA Global Real Estate Investment Trust (REIT) and Property Income Fund in this form.

**For AXA Global Real Estate Investment Trust (REIT) and Property Income Fund Only**

**Risk Disclosure Statement**

This document provides investors key risk information regarding the Fund. The information contained in this document is intended to help you understand the nature and risks of investing in the Fund. Prior to investing in the Fund, you are advised to read this document to assess suitability to the Fund.

**INFORMATION ABOUT THE FUND**

Fund Manager:	AXA Philippines
Fund Name:	AXA Global REIT and Property Income Fund
Payout Feature:	The Fund targets a 5% annualized payout rate (0.42% monthly), which is not guaranteed and may change at the discretion of AXA Philippines.
Payout Frequency:	Monthly
Payout Computation:	The income payout amount shall be based on the market value of the client's investment on declaration date multiplied by the payout rate.
Asset Management Charge:	1.95% (inclusive of VAT)

**Risk Profile Disclosure regarding the Payout Feature of the Fund**



**RISK PROFILE**  
High Risk



The Fund is in category 5 due to the high level of volatility of returns. The risk indicator is based on the volatility of the Fund's performance over the last five (5) years. The risk category shown is not guaranteed and may shift over time due to changing level of volatility of the Target Fund.

Due to the investment universe and the investment objective, the Fund is suitable for investors seeking capital growth and income over a 10-year horizon and able to accept high level of volatility.

Variable life insurance product is subject to certain risks, such as, but not limited to **investment, credit, currency, liquidity, mark-to-market, regulatory, and taxation risks**. In addition, by investing in this fund, you are also exposed to the following risks:

- a. **Hedging Risk** – A risk wherein the hedging instrument does not precisely offset the movement of the hedged item, usually due to a breakdown in correlation which results to lower hedge effectiveness. Hedging instruments usually provide protection when the asset value drops, but also limit upside participation performance.
- b. **Real Estate Sector Risk** – As the Fund concentrates its assets in companies engaged in the real estate industry, investors are subjected to movements in the performance of the real estate markets. Property values may fall due to increasing vacancies or declining rents resulting from unanticipated economic, legal, cultural, or technological developments. It may also drop because of the failure of borrowers to pay their loans.
- c. **REIT Risk** – REITs may be affected by changes in the values of the underlying properties that they own or operate. Further, REITs are dependent upon specialized management skills of the fund manager, and their investments may be concentrated in relatively few properties, or in a small geographic area or a single property type.
- d. **Interest Rate Risk** - Interest rates are also tied to mortgage rates which affect some segments in the real estate or property sector. In general, when interest rates go up, mortgage rates also rise thereby decreasing demand for properties such as those in the residential market.



\*If there is more than one (1) Assignee and/or Irrevocable Beneficiary, please indicate their respective names and signatures in the boxes below.

**Name**

**Signature**

**Name**

**Signature**

**Name of Financial Advisor**

**Signature of Financial Advisor**

## How do I track the status of my request?

You will be updated through email.

If you have any query on your request, you may get in touch with us through



Your AXA Financial Advisor

Live chat at

<https://www.axa.com.ph/contact-us>



Your nearest AXA branch

You may also access your policy information and conveniently conduct online transactions through the Emma by AXA PH app or via web at <https://www.axa.com.ph/emma>.

Thank you for choosing AXA, a global leader in insurance and investment, and your partner in protecting what matters.