



**Other Requests and Special Instructions**

REMINDERS

**CHANGE DETAILS OF POLICY OWNER / INSURED**

Submit legal documents showing the correct/new information about the Policy Owner or insured like birth certificate, marriage certificate or official ID's. Depending upon the evaluation of the Company on the materiality of these changes, your premium may or may not change.

**CHANGE BENEFICIARY DETAILS**

If you designate a minor as your beneficiary please identify a Trustee by accomplishing a Trust Deed Agreement Form.

A designation of a beneficiary that is not a member of your immediately family, up to the second degree of consanguinity, will be subject to evaluation and approval.

If more than one beneficiary is named in any class, equal shares shall be assumed unless otherwise specified.

A revocable beneficiary may be changed any time and has no right over the policy while the insured is still living. On the otherhand, the owner/insured may not change anything on the policy without the consent of an irrevocable beneficiary. If irrevocable beneficiary is a minor, and the share does not exceed P50,000 a guardian will need to sign. If the share exceeds P50,000 this application must be accompanied by Letters of Guardianship and a Court Order authorizing this transaction.

A primary beneficiary is the first in line to receive the death benefit. While the contingent beneficiary will only be able to claim if there are no surviving primary beneficiaries.

**DELETE/DECREASE IN COVERAGE**

The effect of a decrease in the Face Amount of the base plan and the deletion or decrease in coverage of the riders are prospective.

**CHANGE SIGNATURE**

If the change in signature is due to marriage, please submit marriage certificate. If the change in signature is due to any other reason, please show ID's or legal documents showing your old and/or new signature.

**GENERAL REQUIREMENTS**

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

Additional requirements 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 on the 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/Service/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:

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