

Redemption Checklist

This contains the list of forms and documents you will need to submit in order to successfully redeem your funds. All information shared shall be kept confidential. Thank you!



- Rampver Financials Redemption Survey
- ATRAM Investment Application Form (redemption section)
- Scanned copy of one (1) valid government-issued ID with 3 specimen signatures



- Rampver Financials Redemption Survey
- Soldivo Investment Application Form (redemption section)
- Scanned copy of one (1) valid government-issued ID with 3 specimen signatures



- Rampver Financials Redemption Survey
- Sun Life Request for Redemption/Fund Switch Form
- Scanned copy of one (1) valid government-issued ID with 3 specimen signatures
- Proof of Bank Account



- Rampver Financials Redemption Survey
- PhilEquity Redemption Order Form
- PhilEquity Settlement Account Form
- Scanned copy of one (1) valid government-issued ID with 3 specimen signatures
- Proof of Bank Account



**ALFM & BPI Investment Management Inc. funds*

- Rampver Financials Redemption Survey
- BIMi Letter of Instruction Form
- BIMi Mutual Fund Order Form (redemption section)
- Scanned copy of one (1) valid government-issued ID with 3 specimen signatures



- Rampver Financials Redemption Survey
- FAMI Account Opening Form
- FAMI Redemption Form
- Scanned copy of one (1) valid government-issued ID with 3 specimen signatures

Note: Scan and send the accomplished requirements to transactions@rampver.com. Please make sure you have COMPLETE requirements so we can process your redemption request. Missing or incomplete requirements will result in delays in receiving your proceeds. Upon successful submission, Rampver will process your redemption request within 5-7 business days. Please be advised that this turnaround time only applies upon submission of your COMPLETE requirements. In addition, there may be an exit fee deducted to your proceeds if you haven't completed the holding period of the fund you are invested in. If you have any questions or need further assistance, please email us at transactions@rampver.com.

Rampver Financials Redemption Survey

Your feedback is important to us. Kindly answer this short survey as part of your mutual fund redemption requirements. All information contained in this survey will be kept confidential. Thank you!

Account Name: _____	Name of Servicing Advisor: _____
Account No: _____	Mobile Number: _____

1. Why are you redeeming your mutual fund investment? (Please check all boxes that apply)						
<input type="checkbox"/>	Realized Gains (I have already achieved my financial goal for this investment)					
<input type="checkbox"/>	Fund Switching (I want to invest in a different mutual fund within Rampver's products)					
<input type="checkbox"/>	Use for another financial product (I will use the proceeds from my mutual fund investment to fund another financial product)					
<input type="checkbox"/>	Emergency (I will use the proceeds from my mutual fund investment to pay for an emergency expense)					
<input type="checkbox"/>	Not satisfied with the returns (I am not satisfied with the performance of my mutual fund investment)					
<input type="checkbox"/>	Others (Kindly specify the reason) _____					
2. Are you satisfied with the services that we provided to you? (With 1 being the lowest and 5 being the highest rating)						
	1	2	3	4	5	
Not Satisfied	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Very Satisfied
3. If you rated us 3 and below, what are the improvements we need to work on to make you consider investing again in the future?						
4. Additional comments and suggestions:						

Name

Signature

Date

Rampver Financials Redemption Survey

Your feedback is important to us. Kindly answer this short survey as part of your mutual fund redemption requirements. All information contained in this survey will be kept confidential. Thank you!

Account Name: **Juan Dela Cruz** Name of Servicing Advisor: **Rampver Representative**
Account No: **INV200000012345** Mobile Number: **(+63) 912-345-6789**

1. Why are you redeeming your mutual fund investment? (Please check all boxes that apply)

- Realized Gains (I have already achieved my financial goal for this investment)
 Fund Switching (I want to invest in a different mutual fund within Rampver's products)
 Use for another financial product (I will use the proceeds from my mutual fund investment to fund another financial product)
 Emergency (I will use the proceeds from my mutual fund investment to pay for an emergency expense)
 Not satisfied with the returns (I am not satisfied with the performance of my mutual fund investment)
 Others (Kindly specify the reason) _____

2. Are you satisfied with the services that we provided to you? (With 1 being the lowest and 5 being the highest rating)

Not Satisfied 1 2 3 4 5 Very Satisfied

3. If you rated us 3 and below, what are the improvements we need to work on to make you consider investing again in the future?

4. Additional comments and suggestions:

Thank you for helping me achieve my financial goals!

Juan Dela Cruz

Name



Signature

January 1, 2024

Date

