



**BPI Investment
Management Inc.**

INVEST and Give

a cause investing initiative by **ALFM**
MUTUAL FUNDS
BY BPI INVESTMENT MANAGEMENT INC.



PROMO MECHANICS:

1. The promo is open to all new and existing individual and corporate clients of BPI Investment Management, Inc.
2. The promo will run from November 13 to December 31, 2017.
3. For every P100,000 worth of investment in any or a combination of the ALFM Mutual Funds, PHP200 will be given on behalf of the client who may choose any of the following foundations where the donation will be given:

I. Ayala Foundation – Education

- a. CENTEX (Center of Excellence in Public Elementary Education)

II. BPI Foundation – Social Entrepreneurship

- a. VIRTUALAHAN

III. Hero Foundation – Education

- a. Dependents of Marawi Soldiers

IV. Give to all (Equally share among all foundations above)

V. Privilege may not be availed in conjunction with other complimentary gift-earning promos being offered by BPI Investment Management, Inc.

4. Investments should only be fresh funds contributed to any of the participating funds.

- a. Participating ALFM Mutual Funds

ALFM MUTUAL FUNDS	
ALFM Money Market Fund	ALFM Euro Bond Fund
ALFM Peso Bond Fund	Philippine Stock Index Fund
ALFM Dollar Bond Fund	ALFM Growth Fund

b. For dollar-denominated funds, investment amount will be converted to its peso equivalent, based on closing rate of foreign-exchange on day of investment.

c. Only investments made within the promo period are qualified. Investments which are basis for entry to this promo shall not be qualified for other ongoing promos of BPI Investment Management, Inc. or its affiliates except for promotions involving enrollment in Investments Online, e-SOA for investments.

PROMO MECHANICS

TERMS AND CONDITIONS

1. For the purpose of this promo, investments will have a one (1)-year holding period. In the event that the client redeems fully/partially prior to the end of the one (1)-year holding period, BPI Investment Management Inc. reserves the right to deduct the value of the donation from the client/s' redemption proceeds.
2. The promo is exclusive to mutual fund accounts booked through BPI and BPI Family Savings Bank Branches or BPI Online Banking and BPI Mobile App.
3. To participate in the promo:
 - a. **Subscription Via Branches** - Client must fill-out the give certificate in the branch where the investment was made.
 - b. **Subscription Via BPI Online Banking or BPI Mobile App** - Client must forward the confirmation e-mail of the investment subscription to bpi_investment@bpi.com.ph, together with the choice of foundation/cause. (with SUBJECT: ALFM Invest and Give Promo 2017), together with their complete name and investment account number. BPI Investment will reply within 15 banking days to confirm receipt of promo participation.
4. The turnaround time for crediting of donations to the foundations:
 - a. **Metro Manila/GMMA** : 15 Banking days from the first banking day of the month
 - b. **Provincial** : 18 Banking days from the first banking day of the month
5. Clients will also receive an email notification to signify the donation given or to be given on their behalf. If no e-mail was received you may email bpi_investment@bpi.com.ph to request for it.
6. Switching of funds is strictly not allowed.
7. BPI Investment Management Inc. has the right to verify the eligibility of the client and his/her investments and to check whether the investment is still outstanding at the end of the holding period.
8. BPI Investment Management Inc. reserves the right to dispute the eligibility of participation in the promo if redemption or reinvestment is identified. In case of dispute, the decision of BPI Investment Management Inc. will be final.



BPI Foundation

WHO WE ARE

The story of empowerment is at the center of BPI Foundation's work. Through our programs in Education, Entrepreneurship, and the Environment, we build the Filipinos' ability to participate in a dynamic economic landscape. Where there are gaps in knowledge and a lack of access to the right opportunities, we build bridges, ensuring that no one is left out of progress, that quality of life improves, and that everyone is able to meaningfully contribute to the continued development of the country.

In order to create innovative ways of solving development challenges, we take BPI's experience as the country's most established financial institution and infuse it with fresh perspectives, collaboration with strategic partners, and a deep understanding of the needs of communities.

BENEFICIARY



Virtualahan is a social enterprise that breaks down employment barriers for People with Disability using technology. We provide them with digital skills training to work as online service providers in the outsourcing industry. We are working towards an inclusive, productive, sustainable, and meaningful workplace that is free from discrimination. In the process, we are building, a safe community that nurtures the well-being of its members and their families. Our dream is to co-create an inclusive, sustainable, and meaningful workplace that treats you as an equal, protects your courage, and empowers you to shine!

Virtualahan also offers employment support and coaching programs to the PWDs they help.



Grace de Loyola
Virtualahan, March 2017

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I was born with Duchene Muscular Dystrophy and my muscles are too weak to support my mobility. I finished my training at Virtualahan March 2017 and they helped me land an online job.

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CENTEX

by  Ayala
Foundation

WHO WE ARE

The Center of Excellence in Public Elementary Education (CENTEX) provides holistic, quality education for bright children from economically disadvantaged families, honing their confidence and competencies not just inside the classroom but also through after-hours learning in the performing arts and other skill-building activities.

BENEFICIARY



Macneil Mendoza

Alumni batch 2010
CENTEX Batangas

“
That you recognize your own limitations, that you serve the people because you want to serve, and not actually leading them just because you think you are the leader.
”

At present: Senior at Ateneo de Manila University, AB Diplomacy and International Relations with Specialization in East and Southeast Asian Studies, scholar



“Be a HERO to our Heroes’ Children.”

WHO WE ARE

HERO Foundation, Incorporated, is a non-stock, not-for-profit organization that was organized by the late President Corazon C. Aquino in 1988 with then Armed Forces of the Philippines Chief of Staff General Renato S. de Villa, who called on the business community to respond to the growing needs of the families our “heroes” have left behind.

HERO stands for **Help, Educate and Rear Orphans**. **Since then**, the foundation has been providing educational stipends to military orphans.

BENEFICIARY

Dependents of the fallen soldiers from the Marawi siege



Sarah O. Baladjay
2014 HERO Graduate
Bachelor of Arts in Communication

“

My goal in life is to finish my studies so that I could help my siblings and my father with our daily Expenses. HERO Foundation helps me to support my studies for me to be able to find a job to help my family.

”

TSgt. Elias Baladjay was assigned in Basilan when he was involved in an encounter with rebels wherein a bullet narrowly missed his heart. But this did not stop him from serving his country. TSgt. Baladjay served a total of 21 years in the Armed Forces of the Philippines before he was given a complete disability discharge in 1997.

Give Certificate

Name of Primary Investor: _____

E-mail Address: _____

Choice of Foundation/s

- BPI Foundation
- Ayala Foundation
- Hero Foundation
- All Foundations

Fund name: _____

Investment Account Number	Booking date	Investment Fund	Amount
_____	_____	_____	_____
_____	_____	_____	_____

Total Investment Amount _____

I hereby understand that by joining the Invest and Give Promo of BPI Investment Management, Inc., I have read, understood and agreed to the Promo Mechanics and Terms and Conditions. I acknowledge that my qualified investment/s should remain invested for at least 1 year from the date of subscription.

Client's Signature: _____

Date: _____

For Bank Use Only:

Checked by: _____

Branch Code:

B	R				
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Branch Name: _____

INVEST
and **Give**

**I AM A CAUSE
INVESTOR!**

This is to certify that _____
is a certified cause investor.

ALFM
MUTUAL FUNDS
BY BPI INVESTMENT MANAGEMENT INC.




**BPI Investment
Management Inc.**

This initiative was made possible by our partners:




CONTACT US

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 bpi_investment@bpi.com.ph

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A Mutual Fund is an open end investment company registered with the Securities and Exchange Commission (SEC) in which the investible cash of numerous investors are pooled in a specific fund («Fund») with the aim of achieving a specific investment objective. The Fund is NOT a DEPOSIT product and is not an obligation of, or guaranteed, or insured by the Fund Manager, and is not insured by the Philippine Deposit Insurance Corporation (PDIC). Due to the nature of the investments, yield and potential yields cannot be guaranteed. Any income or loss arising from market fluctuations and price volatility of the securities held by the Fund, even if invested in government securities, is for the account of the investor. As such, shares of the investor in the Fund, when redeemed, may be worth more or be worth less than his/her initial participation/contribution. Historical performance, when presented, is purely for reference purposes and is not a guarantee of future results. The Fund Manager is not liable for losses, unless upon willful default, evident bad faith or gross negligence. Investors are advised to read the Prospectus of the Fund which may be obtained from authorized distributors before deciding to invest.