

28 July 2025

Dear Valued Client,

Subject: Updating of Client Suitability Assessment (CSA) in Invest Online

Starting August 2, 2025, we shall be implementing an improved online Client Suitability Assessment (CSA) form to take into account your Individual Risk Profile (IRP), which refers to your risk tolerance as the primary accountholder of your investment account/s. A new addition is the section on Account Risk Profile (ARP) which will determine the risk profile of the particular account you will use for your UITF and/or EIP transaction.

You will need to update your Client Suitability Assessment (CSA) before you can proceed to perform any of the following transactions in Invest Online:

- Regular UITF Subscription
- Easy Investment Plan (EIP) Contribution / Unsubscription
- UITF / EIP Redemption

If you need assistance, you can contact our Trust Premium Services team via email at trustcustomercare@bdo.com.ph. Our Trust Premium Services team is available Monday through Friday from 8:30 AM to 5:30 PM.

Thank you very much for your continued trust.

Very truly yours,

BDO Unibank, Inc. – Trust and Investments Group

bdo.com.ph

We find ways®

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