

# Step-by-Step Guide: BPI PERSONAL EQUITY AND RETIREMENT ACCOUNT (BPI PERA)

## HOW TO OPEN A BPI PERA ACCOUNT

### STEP 1: PREPARE THE FOLLOWING REQUIRED DOCUMENTS

#### For Individual Accounts



BPI Savings  
or Checking Account



Valid ID

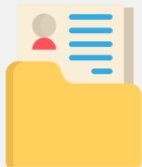


Latest ITR (or any BIR-  
issued document  
validating the TIN)



ID of Beneficiaries  
(if any)

#### For Overseas Filipinos



BPI Savings or Checking Account  
Valid ID  
Latest ITR  
ID of Beneficiaries

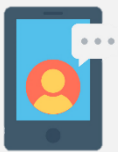


Overseas Employment Certificate  
issued by the Philippine Overseas  
Employment Administration (POEA)\*

\* Or any official document showing that he will earn or has earned income in a foreign country in the year of PERA Contribution

### STEP 2: CONTACT OUR PERA ACCREDITED OFFICERS

You may contact us through the following:



**Mobile**  
0927 136 1319



**Email**  
PERA@bpi.com.ph

You may also visit us at  
the 7<sup>th</sup> Floor BPI  
Buendia Center, Sen. Gil  
J. Puyat Avenue, Makati  
City



## INVEST IN YOUR FUTURE RETIREMENT WITH BPI PERA



Visit [www.bpiassetmanagement.com](http://www.bpiassetmanagement.com)



Email us at [bpi\\_asset\\_management@bpi.com.ph](mailto:bpi_asset_management@bpi.com.ph)

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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, units of participation of the trustor 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 Trustee is not liable for losses, unless upon willful default, evident bad faith or gross negligence. Trustors are advised to read the Declaration of Trust, which may be obtained from the office of the Trustee, before deciding to invest.

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