



**The Philippine American Life and  
General Insurance Company**

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## MEDIA RELEASE

### **Ride on PH's economic growth with Phiam Life Money Tree Elite**

The Philippines continues to have strong economic fundamentals, which subsequently create a bullish business and investment climate.

This provides a good opportunity for Filipinos to partake of potential gains from the country's economic growth through investments.

Most Filipinos, however, still prefer to put their money in banks, which earns very minimal interest rate. And with inflation rates typically higher than deposit rates, the purchasing power of one's money also diminishes over time.

The good news is, people with extra savings can actually grow their money faster if they put their money in flexible investments that can potentially give higher returns over time while allowing them to choose according to their financial goals and risk aversion.

### **Maximizing money's growth potential with Money Tree Elite**

Philam Life, the country's premiere life insurance company, is giving investors this opportunity to grow their money faster, while enjoying full control in managing their plans with the new Money Tree Elite, a one-pay investment and life insurance plan that lets you maximize your money's growth potential.

It has zero entry fee for a Php 1 million minimum investment and long term investors may also receive additional loyalty bonus that can increase their investment.

Investments are placed in funds that are expertly managed by Philam Asset Management Inc. (PAMI), Philam Life's subsidiary and asset management arm, whose funds have grown seven to 15 percent yearly over the past ten years, i.e., from November 2004 to November 2014. This is particularly auspicious as the Philippines is expected to sustain strong economic fundamentals in 2015, which subsequently creates a favorable investment outlook.



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PAMI is one of the largest asset and wealth management companies in the country, managing mutual funds from different asset classes and is a major contributor to the development of the Philippine mutual fund industry. PAMI has won nine awards from PIFA, and recently been named Most Trusted Brand for 2015, Investment Fund Category by Reader's Digest.

With Money Tree Elite, investors have full control in managing the plan based on their investment goal or risk appetite. They have the option to choose their investment fund, switch funds and add to their investment anytime without additional cost.

Conservative clients can choose the PAMI Philam Bond Fund, which is for investors seeking stable income from fixed income securities. Investors with a balanced risk appetite can go for the PAMI Philam Fund, which consists of a balanced portfolio of fixed income securities and stocks listed on the Philippine Stock Exchange (PSE); while investors comfortable with risk and seek maximum capital growth over the long term should choose the PAMI Philam Strategic Growth Fund.

Plan holders also get guaranteed life insurance benefit of at least 125 percent of their investment regardless of the prevailing market conditions. For customers with the need for more comprehensive protection, Money Tree Elite also has optional benefits for higher insurance coverage, accident protection and critical illness coverage.

**Exclusive Offer for Philam Life Customers**

For existing Philam Life customers, they can avail of Money Tree Elite for P500,000 minimum investment, plus enjoy higher insurance coverage of up to 225% of their investment. This offer is available until May 31, 2015 only.



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## **Choosing the right financial partner**

Putting your money in the right investment is, however, not enough; there is also the need for investors to safeguard their hard earned money with the most trustworthy financial partner – one that has proven stability, strength and track record of fulfilled promises and is represented by professional and experienced financial advisors.

Philam Life, throughout its 68-year history, remains to be the country's premier life insurance company with total assets of Php209.1 billion. Philam Life has released education benefits of Php 7.5 billion (2004-2013) and insurance benefits of Php 100 billion (1950-2013). Through an extensive network of over 9,000 financial advisors, Philam Life serves the holders of over 800,000 individual policies and over 1,000,000 participating members of group policies. Philam Life is a member of AIA Group Limited, the largest independent publicly listed pan-Asian life insurance group.

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### **About Philam Life**

The Philippine American Life and General Insurance Company (Philam Life) is the country's premier life insurance company. Established on June 21, 1947, Philam Life offers an extensive line of products in the industry that provides solutions to various financial needs including life protection, health insurance, savings, education, retirement, investment, group and credit life insurance.

Philam Life is a member of AIA Group Limited, the largest independent publicly listed pan-Asian life insurance group.

### **About Philam Asset Management (PAMI)**

Philam Asset Management, Inc. (PAMI) is an asset management company that administers, distributes and provides investment advisory to nine mutual funds. PAMI is a wholly owned company of Philam Life – the country's premier life insurance company – which is a member company of the AIA Group, the largest pan-Asian life insurance group that has a unique heritage of serving the world's most dynamic region for more than 90 years.

Established in 1992, PAMI is one of the largest asset and wealth managers in the mutual fund industry with more than PhP40 Billion Assets under management as of June 30, 2014.

A major contributor to the development of the Philippine mutual fund industry, PAMI is a leader in asset management in the Philippines, managing nine funds from different asset classes for different client risk appetites namely: Philam Managed Income Fund, Philam Bond Fund, PAMI Global Bond Fund, and Philam Dollar Bond Fund, Philam Fund, PAMI Asia Balanced Fund, NCM Mutual Fund of the Philippines, and PAMI Horizon Fund and lastly, the Philam Strategic Growth Fund.



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### **About AIA**

AIA Group Limited and its subsidiaries (collectively "AIA" or the "Group") comprise the largest independent publicly listed pan-Asian life insurance group. It has operations in 17 markets in Asia-Pacific – wholly-owned branches and subsidiaries in Hong Kong, Thailand, Singapore, Malaysia, China, Korea, the Philippines, Australia, Indonesia, Taiwan, Vietnam, New Zealand, Macau, Brunei, a 97 per cent subsidiary in Sri Lanka, a 26 per cent joint venture in India and a representative office in Myanmar.

The business that is now AIA was first established in Shanghai over 90 years ago. It is a market leader in the Asia-Pacific region (ex-Japan) based on life insurance premiums and holds leading positions across the majority of its markets. It had total assets of US\$167 billion as of 30 November 2014.

AIA meets the long-term savings and protection needs of individuals by offering a range of products and services including life insurance, accident and health insurance and savings plans. The Group also provides employee benefits, credit life and pension services to corporate clients. Through an extensive network of agents, partners and employees across Asia-Pacific, AIA serves the holders of more than 28 million individual policies and over 16 million participating members of group insurance schemes.

AIA Group Limited is listed on the Main Board of The Stock Exchange of Hong Kong Limited under the stock code "1299" with American Depositary Receipts (Level 1) traded on the over-the-counter market (ticker symbol: "AAGIY").