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**COMPANY
PROFILE**

About Us

Established in 1989, PhilPlans has grown into a leading pre-need provider in the Philippines, offering Filipinos financial security through pension, education, and memorial plans.

PhilPlans is part of the Maestro Holdings family under the Tanco Group and is one of the industry's largest, with a P700 million capitalization, exceeding Insurance Commission requirements of P100 million.

In 2014, PhilPlans became a major investor in Heritage Park in Taguig. Eventually, it took over the management of the Heritage Memorial Park and acquired the Heritage Chapels and Crematorium, and Nacional Memorial Chapel in Quezon City.

As of December 31, 2022, PhilPlans holds Php 23.28 billion in its Trust Fund, with an Actuarial Reserve Liability of Php 20.2 billion. Since 1989, PhilPlans has paid over Php 62 billion in plan benefits.

PhilPlans' footprint has grown significantly in 2023 and 2024 with the establishment of new sales agencies in Angeles City, Vigan City, Batangas City, Urdaneta City, Las Piñas City, Santiago City, Isabela, and Lipa City, further solidifying its commitment to serving more Filipinos nationwide.

With over 300,000 planholders nationwide, PhilPlans leverages its strong financial standing and extensive network to deliver innovative pre-need solutions.

PHILPLANS FIRST, INC. is a corporation duly licensed to sell pre-need plans with Head Office at 14F STI Holdings Center, 6764 Ayala Ave., Makati City

Email: customer-service@philplans.com.ph

Hotline: (02) 8802-7202

Website: www.PhilPlans.com.ph

Facebook: PhilPlans

PHILPLANS FIRST, INC. is regulated by the Insurance Commission with Head Office at UN Avenue, Manila and district offices in Kasambagan, Cebu City and Ecoland, Davao City.

Manila: (02) 8523 -8461 | **Cebu:** (032) 254-0861 | **Davao:** (082) 327-3651

OUR PRODUCTS

Memorial

Honor your life's legacy

When the time comes, PhilPlans ensures you have a solemn farewell so your loved ones can focus on what truly matters - celebrating your life and legacy. We'll handle everything else.

PhilPlans offers two options, Memorial Fund and Memorial Fund Plus. Both help ease the financial burden of losing a loved one.

Memorial Fund covers essential costs associated with funeral arrangements.

- **Grow Your Memorial Fund:** Guaranteed annual increase of 3% up to the time of need to combat inflation and ensuring a dignified ceremony.
- **Nationwide Network:** More Than 300 Trusted Accredited Mortuary Partners that offer exceptional funeral service throughout the Philippines.
- **Always Available:** 24/7 Memorial Service Hotline for assistance.

Memorial Fund Plus offers additional benefits.

- **Living Cash Benefit:** We believe in celebrating life too! Enjoy a portion of the benefits while you're still around with our Living Cash Benefit. This provides a guaranteed payout for 5 years, plus a lump sum payout in the 6th year.
- **Immediate Cash Assistance:** Receive a cash benefit to help with wake expenses, interment, or additional funds for memorial lots, columbarium, or other immediate needs.

Pension

Futura

The Guaranteed Pension Plan for a Secure Retirement

Imagine a future where you can relax and enjoy your golden years with peace of mind. PhilPlans' Futura makes that dream a reality. Here's what PhilPlans' Futura offers for a P1,000,000 Contract Price:

- **Guaranteed Cash Benefits:** Receive a guaranteed yearly cash benefit of 5% of your contract price. That's like getting P 50,000 every year for 15 years, starting on your 10th plan anniversary and lasting until your 24th.
- **Return of Investment:** On your 25th plan anniversary, you'll receive 100% of your contract price back, a guaranteed P 1,000,000 plus free insurance coverage of up to 300% of the contract price. Guaranteed return of 175% and maximum potential return, including insurance, of 475%
- **Maximum Potential Return:** With PhilPlans' Futura, you can accumulate a maximum potential return of up to P 4,750,000.

Ingat Yaman Kaban

- Guaranteed Funds for Future Use
- Guaranteed Yearly Cash Benefits starting on the 11th year up to the 14th year
- Guaranteed lump sum amount on the 15th year.
- Additional Insurance Coverage Free
- Guaranteed Return of 140%

Education Plans

Summa College Education Plan

Empower Your Child's Future NOW with Guaranteed P750,000 Cash Benefits

Get a guaranteed **P500,000** to help cover their schooling, with an affordable **P412,500** total contract price.

Plus, a special graduation gift of **P250,000 awaits them**, for a total of **P750,000 in guaranteed cash benefits!**

STI College Education Plan

Flexible Payments, Guaranteed Education!

Guaranteed seat for a 4-year college course in any STI College Campus.

PhilPlans STI College Education Plan comes in two options:

STI College Plan (5 YEARS): Save Now, Secure Later. Invest steadily over five years and use the funds when your child is ready for college. Enjoy flexible payment terms: annual, semi-annual, quarterly, or monthly.

STI College Plan SPOT CASH: Instant College Seat. Make one-time savings (spot cash payment) to lock-in your child's slot in any STI Campus. Ready to be used or availed after 30 days.

Vision

To be the trusted partner of Filipinos in their financial journey as they prepare for their future financial needs.

Mission

We are committed to making a difference in the lives of hardworking Filipinos through products and services that allow them to plan for their future financial needs.

Corporate Values

1. Customer Delight

Delight the customer by going beyond customer satisfaction.

2. Fair Return

Ensure a fair return through profitable operations.

3. Excellence & Professionalism

Exemplify professionalism through integrity, respect, honesty, loyalty, accountability, and hard work.

4. Leadership

Lead by motivating and inspiring people.

5. Innovation

Innovate in new products and services to delight our customers. Innovate through constant improvement in processes and procedures.

6. Teamwork

Work as one team by thinking in terms of “what’s in it for us” instead of what’s in it for me”.

Board of Directors

Joseph Augustin L. Tanco

Monico V. Jacob

Jaime B. Dizon

Martin K. Tanco

Ester T. Gabaldon

Jose F. Buenaventura

Paolo Martin O. Bautista

Maria Vanessa Rose L. Tanco

Independent Directors

Johnip G. Cua

Juan Kevin G. Belmonte

Vida T. Chiong

Company Officers

President & Chief Executive Officer - Jaime B. Dizon

SVP, Chief Sales and Marketing Officer - Ronald S. Bautista

SVP, Chief Operations Officer - Rita Lourdes P. Peralta

VP, Deputy Chief Finance Officer - Vilma S. Domingo

VP, Human Resources Department and Customer Value Management - Eden B. Villegas

VP, Actuarial Services - Don C. Garcia

VP, Internal Audit - Gertrude P. Umali

VP, Alternative Sales - Reynalyn A. Laforteza

Contact Us

Home Office Address: 14th Floor, STI Holdings Center, 6764 Ayala Avenue, Makati City, 1226 Philippines

Business Hours: 8:00 am – 5:00 pm (Weekdays)

Plan status and other inquiries:

Phone: (02) 8802-7202

Email: customer-service@philplans.com.ph

24/7 Memorial Service Hotline:

(02) 8802-7344

(02) 8802-7345

Toll-Free: 1-800-10-800-8888