

You can find this form online by signing in to your account with your Manulife ID at manulifeim.ca/retirement. Look for "Tools and resources" in the left-hand navigation menu. From there, select "Plan Resources" and then "Forms."


Don't have a Manulife ID yet?

Sign up now to access your account anytime on our secure website. Go to manulifeim.ca/retirement, click 'Sign in' and follow the instructions to set up your Manulife ID.

Please print clearly in the blank boxes. Remember to sign and date the form.

Need help? Contact Customer Service at 1-888-727-7766.

1. Your personal information

Plan Sponsor/Employer				Group Policy number*	
Member number*		Customer number* 10_ _ _ _ _		Reference number Manulife Use Only	
Last name		First name		Middle initial	
Mailing address (number, street, and apartment number)					
City	Province	Country	Postal Code	Telephone number	Ext.
Email address (if applicable)					

***See online account or statement for details.**

2. Important information about transfer between investments

Interfund transfers will be processed using the next available unit value. Unit values are declared after the market close each business day. Interfund transfers received after 4:00 pm EST will be processed using the unit values declared at the end of the next business day.

All transactions involving funds that invest primarily outside of North America will be processed on the second business day. This allows for time zone differences and ensures that unit values reflect the most current market activity.

Transfer minimum of 5% per fund, whole numbers only. Total of all funds being transferred must equal 100%.

Enter the fund code for all funds. Fund code names and details appear online at manulifeim.ca/retirement or in the Group Investment Report. Investments transferred from the Guaranteed Interest Accounts (GIA's) before maturity may be subject to a market value adjustment. A 2% frequent trading fee may apply to interfund transfers into a fund, then out of the same fund within 15 calendar days.

Group IncomePlus

If your plan offers Group IncomePlus note this option is intended to provide you with guaranteed retirement income. Before you select Group IncomePlus, learn more by logging into your account at manulifeim.ca/retirement.

If you transfer funds to your existing Group IncomePlus, please remember that a contribution exceeding 20% of your Guaranteed Benefit Base will reset your Minimum Five (5) Year Holding period whether you make one large contribution or a series of smaller transfers and contributions over a 365 day period.

Interfund transfers from Group IncomePlus will reduce your Guaranteed Benefit Base and the Guaranteed Annual Income Amount it will provide. If the amount of the interfund transfer is more than your Guaranteed Benefit Base, a Freeze Period will begin. You will not be able to make any Occasional Contributions to Group IncomePlus until this period concludes.

3. Your transfer between investments

Contribution source

☐ All	☐ Member Required	☐ Plan Sponsor Required	☐ Member Voluntary	☐ Plan Sponsor Supplementary (Voluntary)
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From: Fund Code

	%	or	\$
	%	or	\$
	%	or	\$
	%	or	\$
	%	or	\$
	%	or	\$
	%	or	\$
	%	or	\$
	%	or	\$
	%	or	\$

To: Fund Code

	%
	%
	%
	%
	%
	%
	%
	%
	%
	%

Must equal 100%

%

4. Your transfer from a Guaranteed Interest Account (GIA)

Investments transferred from Guaranteed Interest Accounts (GIA's) before maturity may be subject to a market value adjustment.

You must transfer 100% of any specific GIA.

Group IncomePlus is not an available option for maturing GIA's.

When do you want to transfer? ☐ Immediately ☐ At Maturity

From: Fund Code	% OR \$
Maturity amount \$	Maturity date (dd/mmm/yyyy)

To: Fund Code	%
Maturity amount \$	Maturity date (dd/mmm/yyyy)

From: Fund Code	% OR \$
Maturity amount \$	Maturity date (dd/mmm/yyyy)

To: Fund Code	%
Maturity amount \$	Maturity date (dd/mmm/yyyy)

Do you want these instructions to apply to all GIA's matching this investment code? ☐ Yes ☐ No

If no, please specify which GIA you would like your instructions applied to by completing below:

Maturity amount \$	Maturity date (dd/mmm/yyyy)
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5. Your future investment direction (For future contributions only)

A minimum of 5% per fund, whole numbers only.

If you do not complete this section, or the total does not add up to 100%, all amounts will be deposited to the plan default fund.

If your plan offers Group IncomePlus note this option is intended to provide you with guaranteed retirement income Before you select Group IncomePlus, review *The Bold Print*—a separate document that you'll find on the secure site under the 'Plan for Retirement' section OR at manulife.ca/groupincomeplus.

Option A

If you choose to apply the instructions provided in **Your transfer between investments** section above to your future investments also, check here: ☐

Or

Option B

Please enter the fund codes, fund names and percentages for all the funds in which you wish your future contributions to be allocated. Fund code names and details appear online at manulifeim.ca/retirement or in the Group Investment Report.

Fund code	Fund name	%
Your percentages must add up to 100%.		

The investment performance of amounts directed to a market based fund is not guaranteed.

6. Please sign here

Manulife reserves the right to return incomplete forms, or forms that have been filled out incorrectly. You will receive written confirmation once your transaction(s) have been processed. In the event that there was an error made processing your transaction, you have thirty days to notify Manulife upon receipt of confirmation.

If I have selected Group IncomePlus, I acknowledge that I have read and understood *The Bold Print* (a separate document that you'll find on the secure site under the 'Plan for Retirement' section **or** at manulife.ca/groupincomeplus) and by signing below, I agree to the terms, conditions, and fees applicable to that option.

Member's signature	Date signed (dd/mmm/yyyy)
Plan Administrator's signature (if required)	Date signed (dd/mmm/yyyy)

Personal information

We collect, use, and disclose your personal information for the purpose of processing your request. We disclose your personal information to authorized employees, agents, representatives, financial institutions and other parties with whom we deal with in issuing and administering your product(s) and services, now and in the future. Also, we disclose your personal information to service providers who require this information to perform their services for us (for example data processing, programming, data storage, and printing). Unless there are contractual limitations, your personal information may be accessed or transferred within or outside Canada and may be subject to the laws of those jurisdictions. You may withdraw your consent subject to legal and contractual restrictions. You also have the right to access and correct your personal information maintained in our files. For further information you can review our Privacy Policy or email us at Canada_Privacy@manulife.ca.

Send us your documents online



It's faster and safer than email or regular mail.

From your Manulife Mobile app, sign in with your Manulife ID (choose Group Retirement). From the top left menu, select your name to get to your profile, then select **Send documents**.

or

From your desktop or tablet, sign into your account at manulifeim.ca/retirement using your Manulife ID. Look for **Send documents** on your homepage under 'Quick links' **or** 'Helpful information'.

If you need to mail the form, send it to one of the addresses below.

Outside of Quebec:

Manulife
Group Retirement
P.O. Box 396
Waterloo, ON N2J 4A9
Fax: 1-866-945-5110

Quebec:

Manulife
Group Retirement
2000 Mansfield, Suite 1410
Montréal, QC H3A 3A2
Fax: 1-866-945-5109