

If you belong to more than one plan, complete a separate form for each plan.

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.

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

Group policy number*	Member number*	Reference number Manulife use only
Last name	First name	Middle initial

*See online account or statement for details

2. Your 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%.

Please note that no assets can be transferred to Group IncomePlus.

Please 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 information

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.

Interfund transfers from Group IncomePlus will reduce your Guaranteed Benefit Base and the Guaranteed Annual Income Amount it will provide.

From: Fund Code			To: Fund Code	
	%	OR	\$	%
	%	OR	\$	%
	%	OR	\$	%
	%	OR	\$	%
	%	OR	\$	%
	%	OR	\$	%
	%	OR	\$	%
	%	OR	\$	%
	%	OR	\$	%
	%	OR	\$	%

	%	OR	\$		%
	%	OR	\$		%
	%	OR	\$		%
Total must equal 100%					

3. 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.

NOTE: You must transfer 100% of any specific GIA.

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

From: Fund Code		To: Fund Code	
	% OR \$		%
Maturity amount \$	Maturity date (dd/mmm/yyyy)	Maturity amount \$	Maturity date (dd/mmm/yyyy)
	% OR \$		%
Maturity amount \$	Maturity date (dd/mmm/yyyy)	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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4. Please read and sign here

 I attest that all of the information contained in this application is true, complete and correct. I understand that this application, once made, is irrevocable and that the plan administrator or his representative cannot be held liable should my circumstances change in the future.

If I am withdrawing or transferring Group IncomePlus investments, I understand that this transaction will affect Group IncomePlus benefits. **I further understand that it is a criminal offence for anyone to knowingly make a false declaration and/or make or use a false document.**

Furthermore, by withdrawing my funds in cash (where available), I acknowledge that these funds may be subject to income tax withholding, fees or market value adjustment. I hereby certify that the information on this form is correct to the best of my knowledge.

Your signature	Date signed (dd/mmm/yyyy)
Irrevocable Beneficiary (if applicable)	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