

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.

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

Group policy number*	Member number*	Customer number Manulife use only	
Last name of member	First name	Middle initial	
Mailing address (number, street and apartment number)			
City	Province	Country	Postal code
Telephone number	Ext.	Email address	

2. Transfer type

- ☐ Transfer to an individual plan with Manulife
- ☐ Transfer to another financial institution

3. Transfer amount

- ☐ Full transfer of all funds

Note: The annual minimum amount (before completion of the transfer) will be withdrawn and deposited to the same financial institution as your scheduled payments.

- ☐ Partial transfer amount

Gross dollar amount
\$

Include Group IncomePlus investments in the withdrawal request: ☐ Yes ☐ No

If you do not make a selection, no money will be withdrawn from Group IncomePlus.

If you selected 'Yes' and withdraw funds from Group IncomePlus that exceeded your Guaranteed Annual Income Amount for the year, your withdrawal will reduce your Guaranteed Benefit Base and the Guaranteed Annual Income Amount it will provide. If the amount of the withdrawal is more than your Guaranteed Benefit Base, a Freeze Period will begin. For more information, 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.

Optional: Select which investments you want to withdraw from. The amounts you indicate below should equal the gross dollar amount.

Investment code	Amount to be transferred \$
Investment code	Amount to be transferred \$

Investment code	Amount to be transferred \$
Investment code	Amount to be transferred \$

4. Transfer information

Ensure any appropriate transfer forms are attached.

Note: New Brunswick Locked-in Funds Transfer Form 3.2 must be completed and received prior to transfer. This form is available online at www.gnb.ca.

What type of plan are the funds being transferred to?

☐ RRIF / LIF / LRIF / PRIF / RLIF	Policy number	☐ RRSP	Policy number
☐ Annuity	Policy number	☐ Pension Plan	Policy number
Name of new financial institution			
Mailing address (number, street and apt. number)			
City	Province	Postal code	

5. Please read and sign here



I understand that I have made a selection from the withdrawal options listed and I require no further information on these options. Where locked-in funds are being transferred, I agree that they will be administered in accordance with applicable legislation.

I acknowledge that making a withdrawal from Group IncomePlus investments in excess of my eligible Guaranteed Annual Income Amount for this year will reduce my Guaranteed Benefit Base and guaranteed retirement income. **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.**

If I am transferring Group IncomePlus investments, I understand that this transaction will affect my Group IncomePlus benefits.

Your signature	Date signed (dd/mmm/yyyy)
Irrevocable beneficiary'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