



Manulife Investments Client Signature Requirements for Segregated Funds, GICs/Term Funds and Annuities

TRANSACTION TYPE		DATE AND TIME** OF CLIENT CONTACT	CLIENT SIGNATURE(S) (FAX ACCEPTABLE)
Address Change		✓	
	Address is c/o someone else's address		✓
Advisor Change			✓
Application (New Contract)****			✓
Beneficiary*, Annuity Settlement Option*, Successor Annuitant* or Successor Owner Designation			✓
Contract Maturity Extension			✓
Deposit		✓	
Dollar Cost Averaging Fund (DCAF)		✓	
Election Form			✓
Fund Switch		✓	
Guarantee Guard		✓	
Guarantee Reset		✓	
MPIP Segregated Pools Contract Householding		✓	
Name Change			✓
Owner Change*, RESP Subscriber or Student Beneficiary Change			✓
PAC (Pre-Authorized Chequing)	Set up		✓
	Increase or decrease amount, change allocation, stop	✓	
	Banking change (with 'personalized blank cheque marked void' or copy of bank statement)		
Rate Guarantee		✓	
Reinvestment		✓	
RESP Grant form			✓
SWP (Scheduled Withdrawal Payments)	Set up*, increase*, decrease, change allocation	✓	
	Banking change (with personalized blank cheque marked 'void' or copy of bank statement)		
Transfers (cash)– Internal*, Fee Option Changes (Between Manulife Investment products only)	ALL PRODUCTS EXCEPT RESP AND UNLOCKING Up to and including \$150,000 AND Owner is same on 'from' and 'to' contracts and no charges incurred	✓	
	Greater than \$150,000 OR Owner different and/or charges incurred		✓
	RESP Any Amount		✓
Transfer to GIF Select*			✓

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Transfers - External* (Out of Manulife Investments)			✓
Transfer to RRIF/LIF/PRIF/RLIF*	Amendment of existing contract to an income plan		✓
Transfers-in-Kind*			✓
Unlocking***			✓
Withdrawal* If banking instructions for direct deposit are changing, a faxed copy of a personalized blank cheque marked 'void' is also required.	ALL PRODUCTS EXCEPT RESP AND UNLOCKING Up to and including \$150,000	✓	
	Greater than \$150,000		✓
	RESP Any amount		✓
	NON-INDIVIDUAL OWNER (e.g. estate, trust) Any amount		✓
	PAYABLE TO A THIRD PARTY Any amount		✓

*Where there is an IRREVOCABLE BENEFICIARY named on the contract, the irrevocable beneficiary and witness signature is required to authorize the transaction

** Date and time for each owner/Subscriber is required if more than one owner/Subscriber is on the contract

***Original signature may be required for some pension department forms

****Please refer to the Dual Method Identification Form (NN1663) for non-face to face sales