Manulife Investments

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**