Reset

Manulife

Internal Transfer Authorization

This form is only to be used for members requesting transfers between policies or plan groups within Manulife's Group Retirement business. Do not use this form for any other transfers including investment changes, withdrawals, marriage breakdown or death.

You can find this form online by signing in, to your account with your Manulife ID at manulifeim.ca/retirement. Look for Forms under 'Quick links' **or** 'Helpful information' on your homepage.

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

Customer number* **10**_ _ _ _ _ _ _ _			
Last name	First name		Middle initial
Mailing address (number, street and apartment number)			
City	Province	Country	Postal code
Telephone number	Ext.	Email address	

*See online account or statement for details

2. Your policy information

I hereby authorize a transfer of all my investments from the policy/plan group to another as listed in the table below.

Current policy number/Plan group	New policy number/Plan group

3. Your Advisor information

I hereby authorize the Advisor(s) indicated below access to the membership details maintained by Canada Retirement, including personal information related to me and my investments.

Advisor is to fill in this section.

Primary Advisor:					
Customer number	Producer	Country	Last name	First name	Middle initial
Secondary Advisor (If applicable):					
Customer number	Producer	Country	Last name	First name	Middle initial

Provide your business contact information.

Business mailing address (number, street and suite number)					
Last name		First name			Middle initial
Mailing address (number, street and apartment number)					
City	Province	Country	Postal code	Telephone number	Ext
Email address					

4. Sign here

Manulife reserves the right to return incomplete forms, or forms that have been filled out incorrectly. I acknowledge that:

- In accordance with legislation, for assets being transferred from a Manulife Group Retirement Income Plan, I will receive my minimum payment for the balance of the year prior to the full transfer of my funds to the new policy/plan group, my assets will be invested in the same investments as my current policy/plan group (if the investments are available in the new policy/plan group), my beneficiary designation information will be carried over from my current to the new policy/plan group;
- I will no longer have access to my historical Manulife statements, rates of return, or tax receipts;
- Any investments transferred from Guaranteed Interest Accounts (GIA) before maturity may be subject to a market value adjustment;
- If I am currently invested in Group IncomePlus investments and am transferring to a new policy/plan group, I understand this transaction may impact by Group IncomePlus benefits;
- Any pre-authorized contributions setup on my current policy/plan group will now be directed to my new policy/plan group;
- If the new policy/plan group that my assets are being moved to is associated with an Advisor, this Advisor will have access to my Manulife account information as well as my personal information.

Member name	Signature of member	Date signed (dd/mmm/yyyy)

Irrevocable beneficiary's signature (if applicable)
I consent to the transfer of the account.

Irrevocable beneficiary name	Signature of irrevocable beneficiary	Date signed (dd/mmm/yyyy)

Advisor name	Signature of advisor	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 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