

Fund Facts go digital

1:33 seconds

SUPER:

Manulife logo

Manulife Investment Management is revolutionizing the way we deliver Fund Facts for segregated fund contracts.

Fund Facts used to be lengthy, bulky documents that contained dozens, if not hundreds, of pages that were ordered, printed, and delivered to clients at point of sale.

We're switching to digital delivery for quick and easy access to individual Fund Facts documents. Digital Fund Facts are now available online and integrated directly in our price & performance tool.

You can easily customize a Fund Facts booklet with a selection of funds.

ACTION:

Image of price & performance tool appears, with a listing of five funds: Manulife Balanced Portfolio GIF Select – InvestmentPlus, Manulife Conservative Portfolio GIF Select – InvestmentPlus, Manulife Growth Portfolio GIF Select – InvestmentPlus, Manulife Moderate Portfolio GIF Select – InvestmentPlus. An animated arrow hovers over the selection box to the left of each fund, and selects these fund by clicking on each box. The boxes change colour to indicate that they have been selected.

SUPER:

You'll also have the option of adding additional resource pages to your booklet.

ACTION:

Image of a section of the price & performance tool appears, with the words "If you would like to include any optional pages in your Fund Facts booklet, please select them below. Text reading "how to read the Fund Facts" appears below, with a selection box appearing to the left of this text. An animated arrow clicks on the selection box.

SUPER:

Fund Facts are available individually or you can create a customized booklet of funds.

And, as always, you can save a list of frequently accessed funds so that you don't have to search for them each time. Tip: Keep a record of exactly what was sent to the client in case they have future questions.

ACTION:

An image of the price and performance tool appears. The tool shows a selection of funds, with boxes marked "FP" and "FF" to the right of the fund names. The FP and FF boxes are enlarged, and an animated arrow hovers over them. The arrow selects four funds and then clicks on a button that reads "Create a Fund Facts booklet (PDF)" that appears on the top right of the tool. The animated arrow then travels to the top left of the tool, and clicks on a button that reads "+add to my list".

SUPER:

Manulife Investment Management's goal is to deliver digitally focused streamlined solutions that make it easier to do business with us and easier for you to do business with your clients.

Digital Fund Facts are available now for the following segregated fund contracts:

Manulife Private Investment Pools – MPIP Segregated Pools

Manulife GIF Select (Includes InvestmentPlus, EstatePlus, and IncomePlus v2.2)

Manulife RetirementPlus®

Manulife PensionBuilder®

Manulife Segregated Fund Registered Education Savings Plan (RESP)
Manulife Ideal Signature Select™
GIF and GIF Encore
GIF Select (Original)
Digital fund facts will be added for our legacy contracts later this fall.
Try digital Fund Facts today!
manulifeim.ca/SFProfiles
Manulife Investment Management logo

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