Reset

Manulife

Withdrawal Request

Use this form for cash withdrawals, transfer of funds to an individual or group plan with Manulife or transfer of funds to another financial institution. 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 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

Plan Sponsor/Employer			
Member number*	Group policy number*	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 withdrawal type

Note: Tax may be deducted and/or a market value adjustment, and/or a service charge applied if applicable. Not all withdrawal types may be available under your plan. See your Plan Administrator for details.

❏ Transfer to an individual or group plan within Manulife (complete section 3, 4 and 6)

❏ Transfer to a different financial institution (complete section 3, 4 and 6)

❏ Cash Withdrawal- pay directly to me- (complete section 3, 5 and 6)

3. Your withdrawal amount

Please be aware: Due to the market fluctuations a partial dollar value requested for withdrawal may not be available at the time the transaction is being completed. If the partial dollar value requested for withdrawal is equal to 96% to 99% of the Member account value, the entire Member account value will be withdrawn.

❏ Full withdrawal of all available funds
Are future contributions going to continue? ❏ Yes ❏ No (If no, member status will be changed to inactive)

❏ Partial withdrawal: Amount $________________

❏ Gross ❏ Net or ❏ All Available (If no selection is made your default will be Gross)

If applicable, 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If you do not make a selection, no money will be withdrawn from Group IncomePlus. For further information regarding Group IncomePlus including any impacts of a withdrawal go to manulife.ca/groupincomeplus.

To select your funds to withdrawal from, complete below.

If you don’t specify which funds to withdrawal from, Manulife’s default withdrawal order will be used within each contribution category to process this withdrawal. Manulife’s default withdrawal order follows a standard hierarchy of risk, withdrawing money from the least risky funds (Money Market funds and Guaranteed Interest Accounts) first and then more risky funds (market based-funds, generally in ascending order of fund code).

Optional: Select which investments you want to withdraw from. Must equal total amount shown above.

Investment code	Amount to be withdrawn $	Investment code	Amount to be withdrawn $
Investment code	Amount to be withdrawn $	Investment code	Amount to be withdrawn $

4. Your transfer information (Only for transfers to other Manulife accounts or other financial institutions)

If applicable, ensure appropriate transfer forms are attached.

What type of plan are the funds being transferred to?

- ❑ RRSP/LIRA Policy Number:____________________
- ❑ Pension Plan Policy Number:_________________________
- ❑ Annuity Policy Number:____________________
- ❑ RRIF/LIF/LRIF Policy Number:_________________________
- ❑ TFSA Policy Number:____________________
- ❑ Non-Registered Policy Number:_________________________

Financial Institution Details:

Name of financial institution		
Mailing address (number, street and suite number)		
City	Province	Postal Code

5. Your payment method

For cash withdrawals only: Direct deposit is available only to Canadian currency bank accounts.

- ❑ Use banking info on file.
- ❑ Use attached void cheque or bank letter. (Name and address must be included.)

If we do not have banking info on file, a cheque will be mailed to the address on file.

6. Please 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.

By withdrawing my funds, I acknowledge that the withdrawal may be subject to applicable income tax withholding, fees, or market value adjustment. I hereby certify that the information on this form is correct to the best of my knowledge.

If I am withdrawing 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)
Plan Administrator'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 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