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**Don't have a Manulife ID yet?**

Sign up now to access your account anytime on our secure website. Go to [manulifeim.ca/retirement](http://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
Last 3 digits of SIN		

\*See online account or statement for details

## 2. What would you like to do?

Complete only the sections relevant to the change you are making. Indicate the type of change you would like to make.

- Name/date of birth/social insurance number (SIN) change – complete sections 3, and 6
- Beneficiary change – complete sections 4 and 6
- Contact information change – complete sections 5 and 6

## 3. Your change of name/date of birth/social insurance number (SIN)

Last name	First name	Middle initial
Date of birth (dd/mmm/yyyy)		Social insurance number (SIN)
Witness/Plan Administrator's signature		Date signed (dd/mmm/yyyy)

For the above changes, provide the following proof

**Name change** - copy of marriage certificate, name change certificate, or clear copy of driver's license and/or have your plan administrator sign the form.

**Date of birth correction** - a valid ID (e.g. driver's license)

**Social insurance number (SIN) change** – confirmation of SIN letter along with your signature

## 4. Your beneficiary designation

If you do not name a beneficiary, proceeds will be paid to your estate.

For **Registered Pension Plans and Locked in Products**, your Spouse or Common Law Partner is automatically entitled to the death benefit and is first in line ahead of any other beneficiary you designate unless they choose to waive their entitlement.

A **revocable** beneficiary can be changed at anytime.

An **irrevocable** beneficiary can only be changed with written consent from that beneficiary. You may also need your beneficiary's consent to withdraw or transfer money from your account. A parent or guardian cannot provide consent on behalf of a minor who has been named as irrevocable beneficiary.

Beneficiary designations are considered revocable unless you write "irrevocable" in the chart(s) below. If a beneficiary designated below predeceases you, any benefit payable to that beneficiary will be shared equally among the surviving designated beneficiaries.

**For Quebec only:**

The designation of a married or civil union spouse as a beneficiary is deemed to be irrevocable unless specified here:  Revocable

In the event of an annulment or dissolution of civil union or divorce or nullity of marriage, the designation is automatically revoked. The designation of any other person is revocable unless otherwise stipulated.

A **primary beneficiary** is the person, people or entity you choose to receive the death benefits. If you choose more than one beneficiary, you will need to indicate what percentage of the benefit you would like each person to receive. When multiple primary beneficiaries are named, the total of the percentages allocated to each primary beneficiary must add up to 100%.

A **contingent beneficiary** is the person, people or entity you designate to receive the death benefits if all of the primary beneficiaries die before you.

**List all primary beneficiaries.**

Name (last, first, and middle initial)	Relationship	Date of Birth	Percentage of proceeds
			%
			%
			%
<b>Total must equal 100%</b>			

**List all contingent beneficiaries.**

Name (last, first, and middle initial)	Relationship	Date of Birth	Percentage of proceeds
			%
			%
			%
<b>Total must equal 100%</b>			

If you choose to name more than three Primary and/or Contingent Beneficiary(ies), please indicate that a separate page with your additional designations is attached, signed and dated here:

**Trustee for a minor beneficiary named above (not applicable in Quebec)**

If you die when your beneficiary is still a minor, the Trustee you name on this form will receive and manage the money you leave to the beneficiary in Trust until the minor reaches the age of majority for your specified province. **In Quebec**, the proceeds will be paid in trust to the minor child’s tutor. Parents are considered tutors of their child.

Trustee name	Relationship
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**Generally, a person holding power of attorney cannot designate or change a beneficiary on behalf of member.**

**5. Your change of contact information**

Mailing address (number, street and apt. number)				
City	Province	Postal code	Telephone number	Ext.
Email				

## 6. Sign here



You must sign to authorize any of the above changes.

I hereby revoke any prior beneficiary designation and designate the person(s) and/or organization(s) listed above as my beneficiary(ies).

I understand that the effect of my designating a beneficiary irrevocably is that, under the provisions of the respective Insurance Act(s), while the beneficiary is living, I may not alter or revoke the designation without the consent of the beneficiary and I may not assign, exercise rights under or in respect of, surrender or otherwise deal with the contract without the consent of the beneficiary.

### Irrevocable beneficiary signature (if required)

By signing here, as the irrevocable beneficiary, I consent to the above change in beneficiary designation and understand that by doing so, I relinquish my rights as irrevocable beneficiary under the policy.

An electronic or digital signature cannot be used if you have designated a beneficiary(s).

Your signature	Date signed (dd/mmm/yyyy)
Irrevocable beneficiary'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](mailto: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](http://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