Reset

Contribution to your
Tax-Free Savings Account (TFSA)

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.

Print clearly in the blank boxes. Remember to sign and date the form.
Need help? Contact Customer Service at 1-888-727-7766.

To make a lump sum contribution to your Manulife Group Tax-Free Savings Account:
1. Complete this lump sum contribution form.
2. Write your group policy number on the back of your cheque.
3. Attach your cheque made payable to Manulife to your completed form.

1. Your personal information

Plan sponsor/Employer	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. Identity document

Choose one Government Issued Identification
☐ Canadian passport ☐ Birth certificate ☐ Driver's license ☐ Canadian citizenship card ☐ Other ________________

Document number	Expiry date	Issuing Province

3. Your lump sum contribution

Process this contribution using the following fund direction:

☐ Same as my regular contribution

OR

☐ As I have indicated below

Total amount of contribution $ _______________

Investment direction(s) for the lump sum only

Fund code names and contribution details appear online at manulifeim.ca/retirement or in the *Group Investment Report*.

Fund code	Fund name	Dollar amount		Percentage
		$	**OR**	%
		$	**OR**	%
		$	**OR**	%
		$	**OR**	%
		$	**OR**	%
			Your percentages must add up to 100%	%

4. Signature

Authorized signature	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 of 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