

# Request for withdrawal

Montréal  
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## Section 1 – Member information

Client no.	Client name	
Family name	First name	
Home address (no., street, apt.)		
City	Province	Postal code
Telephone	SIN	

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## Section 2 – Withdrawal details

I hereby request that Manulife, in accordance with the plan rules, withdraws the following amounts of the plan listed below and follow the instructions provided (you must complete a form for each plan that you want to make a withdrawal from).

NOREG      TFSA      RRSP      RRSP-Spousal      Other (Specify)

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## Section 3 – Group program administrator/sponsor authorization (if applicable)

If closing the member's account, please select one of the following:

All contributions to be included in the settlement have been reported to Manulife

A cheque in the amount of \$ \_\_\_\_\_ is attached, covering the total amount of unreported contributions for this member

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**To complete in all cases:**

Date of employment (employee/member)	Date of joining plan (employee/member)	Province of employment (employee/member)
Signature		Date

## Section 4 – Amount of the withdrawal

For a complete withdrawal, please specify “100%” in the percentage column. If the amount is to be taken from specific funds, please complete the Appendix.

Accounts for contributions	Complete one column only		
	Gross	Net	Percentage (%)
No preference			
Employer			
Employee			
Voluntary			
Other (Specify)			

## Section 5 – Payout instructions

I wish to have my assets paid in cash (less federal and provincial taxes), if applicable.

I wish to obtain information about The Manulife Personal Plan™.

I wish to have my assets [less federal and provincial taxes], if applicable, directly deposited into my bank account. I have enclosed a “VOID” cheque.

## Section 6 – Signature

I understand that the personal information you collect will be kept strictly confidential and will only be used, exchanged and retained for the purpose of this plan. I certify that the information given is true, correct and complete, to the best of my knowledge.

I certify that I am aware of the fees, penalties and withholding taxes related to the withdrawal. (For any questions relating to this, please contact Manulife at 1 800 242-1704)

<b>Signature</b>	<b>Date</b>
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## Note

1. For Compound Interest Accumulator (CIA) deposits:
  - b. Withdrawals from a given CIA term deposit are processed on a first-in, first-out basis, i.e. the earliest investment (first-in) is the first to be withdrawn (first-out), the second earliest investment is the next to be withdrawn, etc.
  - c. Withdrawals are subject to a market value adjustment.
  - d. Market-related funds are not guaranteed and the value of a member’s investments upon the withdrawal request received will vary according to market conditions and the success of the funds’ manager.
2. A service fee of \$75 will be charged if the bank details provided to us is incorrect and the deposit cannot be completed.

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**Appendix – Withdrawals from specific funds (voluntary)**

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**Note**

1. Indicate partial withdrawals by whole dollar amounts or percentages.
2. Cash payments will be net of required withholding tax.
3. For partial market-related fund withdrawals, the dollar amount cannot exceed 90% of the fund value.

<b>Code</b>	<b>Fund name</b>	<b>Complete only 1 column</b>	
		<b>Amount (\$)</b>	<b>Percentage (%)</b>