

Please print clearly in the blank boxes. Remember to sign and date the form.

If a member belongs to more than one plan, complete a separate form for each plan.



This form is also available at [www.manulife.ca/GRO](http://www.manulife.ca/GRO) in the 'Manage your plan' section.

### Send us stuff online

Send us your completed form by signing in to your online account at [Manulife.ca/GRO](http://Manulife.ca/GRO). Look for **Send documents** in your homepage under the 'My Account' tab.

### Not signed up yet?

Access your savings anytime, using our secure website. Go to [Manulife.ca/GRO](http://Manulife.ca/GRO) and click 'Sign in' to get started.

## Deceased annuitant's information

**Note:** Original documents will be returned upon settlement if requested.

Last name of deceased member	First name	Middle initial	SIN
Date of death (dd/mmm/yyyy)	Date of birth (dd/mmm/yyyy)	Policy number	Member number

In what capacity are you claiming entitlement to this benefit?  Spouse  Beneficiary  Estate

### Proof of Death requirements

- If claim is less than \$100,000, attach Funeral Director's statement or Death Certificate
- If claim is more than \$100,000, attach Death Certificate

## Death benefit information

**Note:** The spouse may have priority entitlement to the death benefit, or may have been named as Successor Annuitant, unless the spouse has waived entitlement. (Refer to 'Definition of Spouse' on page 3.)

Does the deceased have a surviving spouse?  Yes  No

If Yes, and you are the surviving spouse entitled to the death benefit, please complete the section below.

If No, and you are not the spouse, or if there was no individual who satisfies the definition of spouse at the date of death (see page 3 for 'Definition of Spouse'), then Form GP5000E 'Declaration and Indemnity Agreement' must be completed. Please contact Manulife at 1-888-727-7766 to request a copy of the form.

If you are the beneficiary or the executor/liquidator acting on behalf of the estate entitled to the death benefit, please complete the section below.

Name (last, first and middle initial)			Relationship to deceased member	
Address			Date of birth (dd/mmm/yyyy) (if applicable)	
City	Province	Postal code	Telephone number	SIN (if applicable)
Email				

## Payment options

Transfer options may also be available for eligible dependants. Please contact a Client Service Representative for details.

Please contact us for alternative settlement options if you are the Successor Annuitant, or if this contract provides for spousal income under Group IncomePlus.

### A. Available only to a spouse:

- Transfer to another plan with Manulife\*
- Transfer to another financial institution\*
- Cash (if funds not locked-in)\*
- You are the Successor Annuitant and you wish to continue to receive payments under this plan

### B. Available to other beneficiaries:

- Cash
- Do you wish to receive information about available Manulife products?  Yes  No

\* If this contract provides for spousal income under Group IncomePlus, this election will terminate the contract and will result in voiding all Group IncomePlus guarantees (available to spouse only).

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## Transfer information

What type of plan are the funds being transferred to?

- RRSP/LIRA Policy no. \_\_\_\_\_  Pension Plan Policy no. \_\_\_\_\_  RRIF/LIF/LRIF/PRIF/RLIF Policy no. \_\_\_\_\_  
 Annuity Policy no. \_\_\_\_\_  Non-Registered Plan Policy no. \_\_\_\_\_

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

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## Signature

I understand that I have made a selection from the payment 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 (where available), I acknowledge that these funds may be subject to income tax withholding, fees or market value adjustment.

I understand that if this contract provides for spousal income under Group IncomePlus and I have elected to terminate the contract, this will result in voiding all Group IncomePlus guarantees (available to spouse only).

I hereby certify that the information on this form is correct to the best of my knowledge.

Signature	Date signed (dd/mmm/yyyy)
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### Got something to send to us?

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You'll need your unique customer number and social insurance number to join. You can find your unique customer number on your welcome letter or a recent statement.

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## Mailing instructions

Send your completed form to:

**Manulife**  
Group Retirement Solutions  
2000 Mansfield, Suite 1410  
MONTREAL QC H3A 3A2

## DEFINITION OF SPOUSE UNDER APPLICABLE PENSION LEGISLATION

**Federal:** *Pension Benefits Standards Act, 1985* (applies to employees in the Northwest Territories, Yukon, Nunavut, and of federally regulated Employers such as banking, transportation and communications)

“spouse” means the person who is married to the member or is party to a void marriage with the member.

“common-law partner” means a person who is cohabiting with the member in a conjugal relationship, having so cohabited for a period of at least one year.

**ALBERTA:** *Employment Pension Plans Act*

“pension partner” means (i) a person who, at the relevant time, was married to the member and had not been living separate and apart from the member for 3 or more consecutive years, or (ii) if there is no person to whom subclause (i) applies, a person who, immediately preceding the relevant time, had lived with the member in a conjugal relationship

(a) for a continuous period of at least 3 years, or

(b) of some permanence if there is a child of the relationship by birth or adoption.

**BRITISH COLUMBIA:** *Pension Benefits Standards Act*

“spouse” means (a) a person who at the relevant time was married to the member and not living separate and apart from the member for longer than the 2-year period immediately preceding the relevant time; or (b) if (a) does not apply, a person who was living and cohabiting with the member in a marriage-like relationship, including a marriage-like relationship between persons of the same gender, and who had been living and cohabiting in that relationship for a period of at least 2 years immediately preceding the relevant time.

**MANITOBA:** *Pension Benefits Act*

“spouse” means either of two persons who is married to the member. The definition of spouse includes a common-law partner. A common-law partner of a member or former member is (a) a person who, with the member or former member, registered a common-law relationship under section 13.1 of The Vital Statistics Act, or b) person who not being married to the member or former member, cohabited with him or her in a conjugal relationship (a) for a period of not less than 3 years, if either or them is married; or (b) for a period of not less than one year if neither or them is married.

**NEW BRUNSWICK:** *Pension Benefits Act*

“spouse” means either of two persons who (a) are married to each other, (b) are married to each other by a marriage that is voidable and has not been avoided by a declaration of nullity, or (c) have gone through a form of marriage with each other in good faith that is void and have cohabited within the preceding year,

“common-law partner” means (a) in the case of the death of a member or former member, a person who, not being married to the member, was cohabiting in a conjugal relationship with the member or former member at the time of death of the member or former member and was cohabiting in a conjugal relationship with the member or former member for a continuous period of at least two years immediately before the death of the member or former member, (b) in the case of the breakdown of the common-law partnership, a person who, not being married to the member or former member, was cohabiting in a conjugal relationship with the member or former member for a continuous period of at least two years immediately before the date of the breakdown of the common-law partnership, or (c) in any other case, a person who, not being married to a member or former member at the particular time under consideration, is cohabiting in a conjugal relationship with the member or former member at that time and who has so cohabited for a continuous period of at least two years immediately before that time;

**NEWFOUNDLAND:** *Pension Benefits Act, 1997*

“spouse” means a person who (i) is married to the member or former member, (ii) is married to the member or the former member by a marriage that is voidable and has not been voided by a judgment of nullity, or (iii) has gone through a form of a marriage with the member or former member, in good faith, that is void and is cohabiting or has cohabited with the member or former member within the preceding year.

“cohabiting partner”(i) in relation to a member or former member who has a spouse, means a person who is not the spouse of the member or former member who has cohabited continuously with the member or former member in a conjugal relationship for not less than 3 years, or (ii) in relation to a member or former member who does not have a spouse, means a person who has cohabited continuously with the member or former member in a conjugal relationship for not less than 1 year, and is cohabiting or has cohabited with the member or former member within the preceding year. Same sex spouses are covered under the definition of cohabiting partner.

**NOVA SCOTIA:** *Pension Benefits Act*

“spouse” means either a man or woman who: (a) are married to each other; (b) are married to each other by a marriage that is voidable and has not been annulled; (c) have gone through a form of marriage with each other, in good faith, that is void and are cohabiting or, if they have ceased to cohabit, have cohabited within the 12-month period immediately preceding the date of entitlement.

“common-law partner” means an individual who has cohabited with the member in a conjugal relationship for at least two years, neither of whom is a spouse. Same sex spouses are included under common-law partners.

**ONTARIO:** *Pension Benefits Act*

“spouse” means either a man or woman who: (a) are married to each other; (b) are not married to each other and are living together in a conjugal relationship, (i) continuously for a period of not less than three years, or (ii) in a relationship of some permanence, if they are the natural or adoptive parents of a child, both as defined in the Family Law Act.

**PRINCE EDWARD ISLAND:** Pension Benefits legislation is not in force.

**QUEBEC:** *Supplemental Pension Plans Act*

“spouse” means a person who: (a) is married to or in a civil union with the member; (b) has been living in a conjugal relationship with a member who is neither married nor in a civil union, whether the person is of the opposite or the same sex, for a period of not less than three years; or (c) has been living in a conjugal relationship with an unmarried member for not less than one year if, (i) at least one child is born, or to be born, of their union, (ii) they have jointly adopted at least one child while living together in a conjugal relationship, or (iii) one of them has adopted at least one child who is the child of the other, while living together in a conjugal relationship.

**SASKATCHEWAN:** *The Pension Benefits Act, 1992*

“spouse” means (a) a person who is married to a member or former member; or, (b) if a member or former member is not married, a person with whom the member or former member is cohabiting as spouses at the relevant time and who has been cohabiting continuously with the member or former member as her or his spouse for at least one year prior to the relevant time. Same sex spouses are included under the definition of spouse.