

We, us and our refer to The Manufacturers Life Insurance Company.  
You and your refer to the owner(s).

## 1 General information

Keeping your personal information up to date is important. Not only does it help us provide you the best possible service, it's required by Canada's Proceeds of Crime (Money Laundering) and Terrorist Financing legislation. Please let us know if - for example - your address, phone number, email, occupation or nature of your principal business, beneficial ownership, board of director, signing officer(s), or the intended use of the policy has changed.

Policy number		Name of insured	
		First name	Middle initial Last name
Is the policy owned by a legal entity*? <input type="radio"/> Yes <input type="radio"/> No			
*Entity means a corporation, trust, partnership, association or other organization.			
Name of owner #1		Name of owner #2	
First name Middle initial Last name		First name Middle initial Last name	
Full legal name of entity			

## 2 Policy loan or withdrawal information

Complete **1** form for each individual insurance policy.

If withdrawing PUA/DOI on a Performax Gold, Manulife Par, or Manulife Par with *Vitality Plus*™ policy, please complete *Request for change for Performax Gold and Performax policies*, NN0739E\_PMAX.

This policy loan or withdrawal could result in a taxable gain.

For a policy on payment or premium offset, if you make a withdrawal your reduced policy value may not be sufficient to pay your policy costs. You may need to start making payments to keep your policy in effect.

Manulife UL and Manulife UL with *Vitality Plus*™ policies (policy date after Nov 19, 2021): You can withdraw money from the PGIF account only once per calendar year.

### Loan credit letter

If you receive a T5 tax slip as a result of your loan, you may be entitled to a loan credit letter when you repay the loan.

### T2210-deduction of loan interest

Interest paid on a policy loan used to earn income can be deducted while preparing your income tax return. You can request a T2210 from us.

Type of request	Amount requested		
<input type="radio"/> Policy loan	<input type="radio"/> Maximum loan or partial withdrawal available		
<input type="radio"/> Policy withdrawal	<input type="radio"/> Specific amount (after any charges have been subtracted) \$ _____		
For policy withdrawals, source of withdrawal			
<input type="radio"/> Withdrawal of paid up additions			
<input type="radio"/> Withdrawal of accumulated dividends			
<input type="radio"/> Partial withdrawal (indicate fund name, if applicable) _____			
<input type="radio"/> Other (specify) _____			
Payment instructions for the loan or withdrawal			
<input type="radio"/> Pay by direct deposit			
<input type="radio"/> To policy owner using banking information already on file			
<input type="radio"/> To the bank account indicated here			
			
Transit number		Institution number	Account number
Name of bank or financial institution		Transit number	Institution number Account number
Name of bank account holder(s) (first, middle initial, last)			
Address of bank account holder(s) (street, number and apt number)			
City		Province	Postal code
<b>Note:</b> If the policy has a collateral assignee, direct deposit is not available. We will send a cheque made payable to the policy owner(s) and any assignee(s), to:			
<input type="radio"/> Policy owner <input type="radio"/> Advisor <input type="radio"/> Other (provide name and address)			
Name (first, middle initial, last)			
Address (street, number and apt number)			
City		Province/State	Postal/ZIP code

## 3 Loan details

If a policy loan interest rate (or service charge) is not specified in the policy contract, we will calculate interest at a rate set by us from time to time based on the prime rate being charged by our banker plus 2%.

If the loan and interest, together with all other indebtedness under the policy, at any time exceeds the policy's cash value the policy will automatically terminate, subject to any right of reinstatement provided by the policy.

**4 Signatures**

If the owner is a corporation, we require:

- 2 signing officers' signatures and titles
- or
- 1 signing officer's signature, title and the corporate seal.

If the corporation does not have a seal and you are the only person authorized to sign on behalf of the corporation, in addition to signing, insert your initials in the box provided.

Signed at (city or town)		Province		Signed at (city or town)		Province			
Signature of owner #1				Signature of owner #2					
Title (if applicable):				Date signed		Title (if applicable):		Date signed	
Initial here		Insert your initials here to confirm that you are the only person authorized to sign on behalf of the corporation and that it does not have a seal. You must also sign above.							
Any irrevocable or preferred beneficiaries must sign to show their consent to the policy loan or withdrawal. Minor beneficiaries cannot give consent.									
Signature of irrevocable or preferred beneficiary (if applicable)						Date Signed (dd/mm/yyyy)			