

# Request for change Evidence of insurability NOT required

Mail or fax to Manulife, Individual Insurance:

**Outside Quebec**

500 King Street North  
PO BOX 1669  
WATERLOO ON N2J 4Z6  
Fax: 1-877-763-8834  
manulife.ca

**Inside Quebec**

2000, rue Mansfield, bureau 1310  
Montréal (Québec) H3A 3A1  
Télé. : 1 877 271-5494

Customer service centre:

All provinces except Quebec 1-888-626-8543

Quebec 1-888-626-8843

Outside of North America, call us collect at 1-519-747-6600

- *We, us, and our* refer to the insurer of the policy listed below.
- *You and your* refer to the policy owner.
- For a Performax Gold or Performax policy, use *Request for change for Performax Gold and Performax policies*, NN0739E(PMAX).
- For Synergy, the word *policy* also refers to *solution*.
- 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.

Effective date of change (if applicable) (dd/mmm/yyyy)

**1 General information**

An *insured person* is a person who is insured under the policy or any rider.

Policy number	Branch code	Name of advisor	Advisor code
Name of the insured person (first, middle initial, last)		Date of birth (dd/mmm/yyyy)	

**2a Changes to all types of policies**

\* If this change is for Manulife UL with level death benefit (policy date after Nov 19, 2021), we need to change your death benefit to Face plus and we may need to request evidence of insurability for that change.

\*\* To change the death benefit option to increasing, complete *Application for change*, NN7001E.

\*\*\* To change the dividend option from cash to paid-up insurance, complete *Application for change*, NN7001E.

**Important:** If you are changing the dividend option from Term Option or Enhancement, your yearly term insurance coverage will be cancelled.

† To add a step-child or legally adopted child to an existing rider **or** if your plan requires evidence of insurability for each child, complete *Application for change*, NN7001E.

†† If this change is for Security UL (policy date before Sept. 25, 2004) or Limited Pay UL: any partial cost refund or guaranteed cash value amount released because of a policy change will be placed in your policy investment accounts. To withdraw that amount from your policy (subject to taxation and our administrative rules), select 'Other change' and provide withdrawal instructions.

Correct a birthdate (submit proof of birthdate) from \_\_\_\_\_ to \_\_\_\_\_  
(dd/mmm/yyyy) (dd/mmm/yyyy)

Change from 10-year cost coverage to  Level cost coverage  20-year cost coverage  
 For all insurance **or**  For insurance coverage number(s) \_\_\_\_\_

Change cost type from 10-year renewable to 65 to level cost to 65 (Synergy only)

Change coverage type or coverage option to (Lifecheque only)  
 20-year renewable  Primary  Level  Permanent (payable to age 100)

Change coverage option (Family Term, Family Term with *Vitality*™, Family Term with *Vitality Plus*™, and Business Term) to  Term-20 **or**  Term-65 **or**  Term-life

Premium duration change (available on Manulife Par and Manulife Par with *Vitality Plus*™ only)  
 Change from Pay for 10 years to **Pay for 20 years**  
 Change from Pay for 10 years or Pay for 20 years to **Pay to age 90**

Change from yearly renewable (increasing) to level cost of insurance\*  
 For all insurance **or**  For insurance coverage number(s) \_\_\_\_\_

Change death benefit option to level\*\*

Change joint first-to-die coverage to joint last-to-die, costs to first death (InnoVision policies dated April 21, 2007 or later only).

Change joint first-to-die coverage to joint last-to-die, costs to last death (InnoVision and Security UL only). You must submit a signed illustration **and** select one of the following options:  
 Change all joint first-to-die coverages **or**  
 Change \$ \_\_\_\_\_ of coverage number \_\_\_\_\_

Change dividend option\*\*\* from \_\_\_\_\_ to \_\_\_\_\_  
For Manulife Par and Manulife Par with *Vitality Plus*, if you choose cash as the dividend option, no deposit option payments may be made into the policy.

Add a child born to an insured person to an **existing children's protection rider**†  
Name of child \_\_\_\_\_ Date of birth(dd/mmm/yyyy) \_\_\_\_\_ Sex  Male  Female

Cancel an insurance or rider coverage  
(specify coverage number and, if applicable, name of rider) \_\_\_\_\_

Decrease a benefit or rider (specify name of benefit or rider) \_\_\_\_\_  
from \$ \_\_\_\_\_ to \$ \_\_\_\_\_

Delete an insured person†† (specify name of insured person) \_\_\_\_\_

**2a Changes to all types of policies (continued)**

Decrease face amount\* on coverage number \_\_\_\_\_ from \$ \_\_\_\_\_ to \$ \_\_\_\_\_  
New premium (UL only): \_\_\_\_\_ (specify premium amount or write 'minimum')

Decrease amount of insurance on a Synergy solution from \$ \_\_\_\_\_ to \$ \_\_\_\_\_  
**Note:** For a Synergy solution, only the Synergy amount of insurance can be decreased.

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Change fund (Manulife Investor only) from \_\_\_\_\_ to \_\_\_\_\_  
(name of fund) (name of fund)

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Change to reduced paid-up

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Other change (specify; e.g. change withdrawal order) \_\_\_\_\_

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**►► For changes specific to disability policies only go to section 2b.**

**2b Additional changes to disability policies only**

Do not complete for any changes to a Synergy solution.

Renew disability policy after age 65 (submit a letter of employment on company letterhead that states that the insured person is gainfully employed a minimum of 30 hours per week)

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Decrease benefit period from \_\_\_\_\_ to \_\_\_\_\_

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Increase elimination period from \_\_\_\_\_ to \_\_\_\_\_

**3 Signatures**

Insured person(s) may be a parent or guardian, if applicable.

Policy owner(s)  
(if other than the insured person)

**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, write your initials in the box provided.

**By signing below:**

- You are requesting the changes or deletions shown above to the policy identified in section 1. You authorize us, if necessary, to amend the policy.
- You, any irrevocable beneficiary and any collateral assignee or hypothecary creditor understand that the changes may affect the amount or timing of the benefits payable, the conditions under which the benefits become payable or the expiry date of the coverage.
- You, the insured person, any irrevocable beneficiary and collateral assignee or hypothecary creditor agree that a faxed copy of this form is valid authorization to process these changes.
- If the premiums for this policy are paid by automatic monthly withdrawal, the owner(s) of that bank account agree that:
  - any refund resulting from this change will be deposited to the same account unless you give us other instructions; and
  - we can increase the monthly withdrawal by the new amount required to keep the policy in effect as a result of this policy change. **They waive the right to receive 10 days' notice of the amount of automatic monthly withdrawal.**

Signature of insured person <b>X</b>		Signature of witness <b>X</b>		Date (dd/mmm/yyyy)
Signature of policy owner <b>X</b>	Title	Signature of witness <b>X</b>	Date (dd/mmm/yyyy)	
Signature of policy owner <b>X</b>	Title	Signature of witness <b>X</b>	Date (dd/mmm/yyyy)	
Signature of irrevocable beneficiary <b>X</b>		Signature of witness <b>X</b>		Date (dd/mmm/yyyy)
Signature of collateral assignee or hypothecary creditor <b>X</b>	Title	Signature of witness <b>X</b>	Date (dd/mmm/yyyy)	
Signature of collateral assignee or hypothecary creditor <b>X</b>	Title	Signature of witness <b>X</b>	Date (dd/mmm/yyyy)	
Name of account holder #1 (first, middle initial, last) or full name of legal entity (including Company etc.) (if that person has not already signed above)		Name of account holder #2 (first, middle initial, last) (if that person has not already signed above)		
Signature of account owner #1 <b>X</b>		Signature of account owner #2 <b>X</b>		
Initial here	Write 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.			