# Manulife

#### manulife.ca

Use this form to make changes to the following types of policies: **Customer service centre:**  Manulife UL YRT 
 Manulife UL Level 
 Performax Gold 
 Future Protection All provinces except Quebec Client Investment Client Investment • UltraVision • Secured Protection Security UL 1-888-626-8543 Quebec 1-888-626-8843 • UL100 Select Select Outside North America call collect Innovision Limited Pay UL 
 Navi-vision 519-747-6600 See Universal life investment accounts, NN0983E, for a complete list of available accounts. Use this form to: In this form, you and your mean the owner provide instructions for allocating new or future deposits - page 1 of the policy, and we, our and us mean The change your Specified Daily Interest Account (applies to InnoVision, Limited Pay UL) Manufacturers Life Insurance Company and UL100 policies only) - page 1 (Manulife). provide instructions for allocating new or future additional payments - page 2 Use Automatic Transfer Instructions, • transfer funds between investment accounts within your policy - page 3 NN0947E, if you want to: transfer funds between different investment accounts within your Side Account (does not apply to UL100) - page 4 • set up or cancel automatic transfers, or change the Designated Daily Account transfer funds from your Side Account into your policy - page 4 on a UL100 policy Complete the sections of this form that correspond to the changes you want to make. Sign the bottom of each page you have completed and fax them to us at: 1-877-763-8834 (1-877-271-5494 if you live in Quebec). Policy owner name (first, middle initial, last or full legal name for corporation) Policy number 1 Policy owner information These instructions apply to (check one or both); 2 Allocating your deposits () this deposit of \$ Complete this section if you all future deposits (your instructions will apply to investment accounts in the policy and in the Side Account) want to give us instructions for investing a new deposit or future Tell us how you want to allocate your deposit. % of deposit allocated deposits. Select the investment (see Universal life investment accounts. NN0983E) accounts from the list on Investment account code Investment account name the Universal life investment % accounts. NN0983E. e.g. MA506 = CI Signature Canadian Balanced. Investment account code Investment account name % The effective date for deposits is the business day we receive Investment account code Investment account name the funds at our head office. % Investment account code Investment account name % Investment account code Investment account name % TOTAL 100 % 3 Changing your Specified If you are allocating deposits to a Simple Interest Guaranteed Investment Account (GIA), we deposit the **Daily Interest Account** interest you earn into a separate investment account that you select called your Specified Daily Interest Account. You may not choose a GIA as your Specified Daily Interest Account. Complete this section if you want to **change** your Specified Daily Your new Specified Daily Interest Account (see Universal life investment accounts, NN0983E) Interest Account. Refer to the list Investment account code Investment account name on the Universal life investment accounts, NN0983E, and choose the investment account you want us to deposit future interest payments to. The Specified Daily Interest Side Account will change to match your new Specified Daily Interest Account. Either the policy owner or the insurance advisor must sign. If there are two policy owners, both policy owners or the 4 Sign here advisor must sign. If the policy is owned by a corporation, we require the advisor's signature or the company name and either the titles and signatures of two signing officers, or the company seal and the title and signature of one By signing here you agree to the signing officer. If the corporation does not have a corporate seal and you are the only person authorized to sign on changes you've requested above. behalf of the corporation, sign in the signature box for owner #1 and write your initials in the box provided. Signature of policy owner #1 or signing officer Signature of policy owner #2 or signing officer X X 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. or Signature of advisor Advisor code Date and time of client contact ∩a.m X

**Financial Change** 

○ p.m.

**III** Manulife

### Financial Change – Performax Gold policies

Complete the sections on this page to change your allocation instructions for additional payments to your Performax Gold policy. Sign the bottom of each page you have completed and fax them to us at: 1-877-763-8834 (1-877-271-5494 if you live in Quebec).

5	Policy owner information	Policy owner	r name (first, middle initial, last or full legal name for c	orporation) Pe	olicy number
6	Allocating your additional payments	$\bigcirc$ this de	ructions apply to (check one or both); eposit of \$ ure deposits	·	
	Complete this section if you want to give us instructions for applying a new additional payment or future		you want to allocate your additional payment.		% of additional payment allocated
	additional payments.	To deposit o	ption insurance coverage number		%
	additional payments is the business day we receive the funds at our head office.	To deposit o	ption insurance coverage number		%
		To deposit o	ption insurance coverage number		%
		To deposit o	ption insurance coverage number		%
		To deposit o	ption insurance coverage number		%
		To accumula	tion account		%
				TO	TAL 100 %
7	<b>Sign here</b> By signing here you agree to the changes you've requested above.	advisor mu and either signing off	policy owner or the insurance advisor must sign ist sign. If the policy is owned by a corporation, the titles and signatures of two signing officers, icer. If the corporation does not have a corporat he corporation, sign in the signature box for own	we require the advisor's sign or the company seal and the e seal and you are the only p	ature or the company name e title and signature of one erson authorized to sign on
		Signature of	policy owner #1 or signing officer	Signature of policy owner #2 or	signing officer
		Initial here	Write your initials here to confirm that you are corporation and that it does not have a seal. Y	the only person authorized t ou must also sign above.	o sign on behalf of the
		or		1	
		Signature of	advisor	Advisor code	Date and time of client contact $\bigcirc$ a.m. $\bigcirc$ p.m.

**III** Manulife

## Financial Change

Complete the sections of this form that correspond to the changes you want to make. Sign the bottom of each page you have completed and fax them to us at: 1-877-763-8834 (1-877-271-5494 if you live in Quebec).

All requests for fund transfers that we receive BY 4 p.m. EST will be processed effective the next business day, using the unit value of the previous day's close. Transfer requests received AFTER 4 p.m. EST will be effective the second business day, which means the value will be the value as of 4 p.m. EST the next day.

Policy owner information	Policy owner	name (first, middle ini	tial, last)				Policy number		
Transferring funds	Transfer #1 FROM:	1			то:				
investment accounts	Investment account cod	Investment account name			Investment account code		•	Amount (% or \$)	
Some investment accounts have minimum deposit amounts - see the list on the <i>Universal life investment</i> <i>accounts</i> , NN0983E.									
If you want to make more transfers, complete an additional form.					-				
Remember, when you are making transfers between investment accounts you may also need to	Transfer #2 FROM:	2			TO:				
adjust the investment accounts within your Side Account. If so, select one of the following.	Investment account coo	lnvestment account name			Investment account code			Amount (% or \$)	
You want to transfer the funds in your Side Account according to the transfer instructions you have given us on this page.					-				
You want to transfer the funds in your Side Account as shown on page 4.	Transfer #	3 (For GIAs only)							
The transfer instructions you	FROM: Sin	ple Interest GIAs	1						
give us on this form will not replace any automatic transfer instructions you have in place	Investment account code	Investment account name	Deposit date (dd/mmm/yyyy)	) transfer O now, or			Investment account name	Amount (% or \$)	
on your policy. This will be a one-time request in addition to your automatic transfer.				<ul> <li>now, or</li> <li>at maturity</li> </ul>					
	FROM: Co	mpound Intere	est GIAs	- <b>.</b>		TO:			
	Investment account code	Investment account name	Deposit date (dd/mmm/yyyy)				Investment account name	Amount (% or \$)	
				) at maturity					
				<ul> <li>○ now, or</li> <li>○ at maturity</li> </ul>					
Interest account (if not Savings)									
<b>Sign here</b> By signing here you agree to the changes you've requested above.	advisor mus and either t signing offic	st sign. If the policy he titles and signat cer. If the corporation	is owned by a cures of two si on does not ha	a corporation gning officers ave a corpora	, we require the s, or the compar te seal and you	advisor's sign by seal and are the only	gnature or the c the title and sign person authorized	ompany name nature of one zed to sign on	
							to sign on beha	alf of the	
	or								
	Signature of a	advisor			Advisor code		Date and tir	ne of client contact $\bigcirc$ a.m. $\bigcirc$ p.m.	
	Transferring funds         between the policy's         investment accounts         Some investment accounts have         minimum deposit amounts - see the         list on the Universal life investment         accounts, NN0983E.         If you want to make more transfers,         complete an additional form.         Remember, when you are making         transfers between investment         accounts, you may also need to         adjust the investment accounts         within your Side Account. If so,         select one of the following.         You want to transfer the funds         in your Side Account according         to the transfer instructions you         have given us on this page.         You want to transfer the funds         in your Side Account as shown         on page 4.         The transfer instructions you         give us on this form will not         replace any automatic transfer         instructions you have in place         on your policy. This will be a         one-time request in addition to         your automatic transfer.         Interest account (if not Savings)         Sign here         By signing here you agree to the	Transferring funds       Transfer #         between the policy's investment accounts       Investment account coordination         Some investment accounts have minimum deposit amounts - see the list on the Universal life investment accounts, NN0983E.       Investment accounts, NN0983E.         If you want to make more transfers, complete an additional form.       Transfer #: FROM:         Remember, when you are making transfers between investment accounts, you may also need to adjust the investment accounts within your Side Account. If so, select one of the following.       Transfer #: FROM:         You want to transfer the funds in your Side Account according to the transfer instructions you have given us on this page.       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Investment accounts, NN0983E.         If you want to make more transfers, complete an additional form.       Transfer #2 FROM:         Remember, when you are making transfers between investment accounts, you may also need to adjust the investment accounts within your Side Account according to the transfer instructions you have given us on this page.       Investment account code       Investment account code         You want to transfer the funds in your Side Account as shown on page 4.       Investment account code       Investment account code         Transfer #3 (For GIAs only) FROM: Simple Interest GIAs in your Side Account as shown on page 4.       Investment account code       Investment account code         Investment prelace any automatic transfer.       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Investment accounts       Transfer #2         FROM:       Investment account according to the transfer instructions you have given us on this page.         You want to transfer the funds in your Side Account according to the transfer instructions you give us on this form will not replace any automatic transfer.         The transfer instructions you give us on this form will not replace any automatic transfer.         FROM: Compound Interest GIAS         Investment account (if not Savings)         Interest account (if not Savings)         Sign here         By signing here you agree to the changes you've requested above.         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Signature of policy owne	Profile       Owner minormation         Transferring funds between the policy's investment accounts       Transfer #1 ROM:       To:         Some investment accounts have minimum deposit amounts - see the list on the diversal life investment accounts, NN0983E.       Investment account code       Amount (% or \$)       Investment account code         Remember, when you are making transfers between investment accounts, you may also need to aljust the investment account source accounts within your Side Account 1 is op- select one of the following: in your Side Account according to the transfer the funds in your Side Account according to page 4.       Transfer #2 FROM:       Transfer #2 FROM:         The transfer instructions you are given so this page.       You want to transfer the funds in your Side Account according to pury Side Account according to pury Side Account according to pury Side Account according to pury Side Account as shown on page 4.       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If you want to make more transfers, complete an additional form.       Investment accounts, NN0983E.       To:         If you want to transfer the funds in your Side Account is count on page 4.       Investment account on account name       Amount (% or \$)       Investment account on account on investment account on account name         You want to transfer the funds in your Side Account as shown on page 4.       Investment account code account name       Investment (% or \$)       Investment account code account name       Investment (% or \$)         You want to transfer instructions you give us on this form will not replace any automatic transfer instructions you paker, the addition to your automatic transfer.       Investment investment account name       Oppost date (d/mmm/yyy)       Make Amount (% or \$)       Investment account code in externet account code in externet issuent account on the page.         Interest account (if not Savings)       If you are transferring money into a Simple Interest Glas and if you have not already in wastiment account to receive interest, please select one one. (Default is Savings A investment account code interest please select one one. (Default is Savings A investment account code interest please select one one. (Default is Savings A investment account code inte	Transferring funds between the policy's investment accounts have mit on the Universal Weinvestment accounts, NN0983E.       Transfer #1 FROM:       To:         Some investment accounts have mit on the Universal Weinvestment accounts, NN0983E.       Investment accounts have mit on the Universal Weinvestment accounts, NN0983E.       Investment accounts, NN0983E.       Investment accounts, NN0983E.         Fransfer #2 FROM:       To:       Investment accounts, Nun way also need to adjust the investment account code account name       Oto:         You want to transfer the funds in your Side Account a schoorn on page 4.       Transfer #2 FROM:       To:         You want to transfer the funds in your Side Account as schoorn on page 4.       Transfer #3 (For GIAs only) FROM: Simple Interest GIAS       To:         Transfer #2 FROM:       Transfer #3 (For GIAs only) FROM: Simple Interest GIAS       To:         Transfer #3 (For GIAs only) FROM: Simple Interest GIAS       To:         Transfer #3 (For GIAs only) FROM: Simple Interest GIAS       To:         Transfer #3 (For GIAs only) FROM: Simple Interest GIAS       To:         Transfer #3 (For GIAs only) FROM: Simple Interest GIAS       To:         Transfer #3 (For GIAs only) FROM: Simple Interest GIAS       To:         Transfer #3 (For GIAs only) FROM: Simple Interest GIAS       To:         Transfer #3 (For GIAs only) FROM: Simple Interest GIAS       To:         Transfer #3 (For GIAs only) FROM: Compound Interest GIAS	

**III** Manulife

### Financial Change

Complete the sections of this form that correspond to the changes you want to make. Sign the bottom of each page you have completed and fax them to us at:

1-877-763-8834 (1-877-271-5494 if you live in Quebec).

All requests for fund transfers that we receive BY 4 p.m. EST will be processed effective the next business day, using the unit value of the previous day's close. Transfer requests received AFTER 4 p.m. EST will be effective the second business day, which means the value will be the value as of 4 p.m. EST the next day.

11	Policy owner information	Policy owner	Policy owner name (first, middle initial, last)							Policy number	
12	Transferring funds between investment	Transfer # FROM:	1					TO:			
	accounts within your Side Account	Investment account coo		vestment count name		Amount (% or \$)	Investment account code	Investme account r		Amount (% or \$)	
	This does not apply to UL100, which has only one investment account (a Savings Account) in the Side Account.										
	If you want to make more transfers,			InnoVision nterest GIAs	and Limited	Pay ULGIA		то:			
	complete an additional form.	Investment account code	Invest accou	ment nt name	Deposit date (dd/mmm/yyyy	Make transfer		Investment account code	Investment account name	Amount (% or \$)	
						<ul> <li>at maturity</li> <li>now, or</li> </ul>					
						) at maturity					
		FROM: Cor Investment	npou Invest	nd Interest ( ment	GIAs Deposit date	Make		TO: Investment	Investment	Amount	
		account code		nt name	(dd/mmm/yyyy	) transfer O now, or		account code		(% or \$)	
						<ul> <li>at maturity</li> <li>now, or</li> <li>at maturity</li> </ul>					
	Interest account (if not Savings)					nterest GIA a	nd if you have n now. (Default is				
13	Transferring funds from investments accounts within your Side Account to the matching investment	FROM:									
		Investment account code Investment account name					Amou	nt (maximum ar	nount or \$)		
	accounts within your policy										
	Funds held in investment accounts within the Side Account										
	may only be transferred to the matching investment accounts within the policy.										
	There are also limits on the amount you may transfer. Write 'maximum										
	amount' in the amount column if you want to transfer the maximum amount possible for your policy.	transfers in you write 'm	the or naximu	rder you have	listed the inv we will transfe	estment acco	ounts above, unt	il the limit	e Account, we wi for your policy is austed before tra	reached. When	
14	Sign here								vners, both polic ignature or the c		
	By signing here you agree to the changes you've requested above.	and either t signing offi	he titl cer. If	es and signat the corporation	ures of two si on does not h	igning officer ave a corpora	s, or the compar ate seal and you	ny seal and are the onl	the title and signature of the title the title and signature of the title by person author als in the box pro	nature of one zed to sign on	
		Signature of policy owner #1 or signing officer				Signature of po	licy owner #	2 or signing office			
		Initial here	Write corpo	your initials h ration and tha	nere to confirr at it does not	n that you ar have a seal.	e the only perso You must also si	n authorize gn above.	d to sign on beh	alf of the	
		<b>Or</b>	oduies				Advisor		Data and 4	ma of alignt contact	
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Manulife Universal life investment accounts If you want more information about investment account options, visit www.manulife.ca or contact the Customer service centre: All provinces except Quebec 1-888-626-8543, Quebec 1-888-626-8843, Outside North America call collect 519-747-6600. The tables below list the investment accounts available to the following policies: Manulife UL YRT Client Investment Select Security UL • Future Protection Manulife UL Level Client Investment Select Limited Pay UL Secured Protection InnoVision • UL100 Navi-vision • UltraVision Use both the investment account code and investment account name when completing forms. Example: Investment account code Investment account name MA505 CI Canadian Investment Simple Interest and Compound Interest GIAs (cannot be used as Specified Daily Interest Accounts)  $\blacktriangle$  = Available - minimum investment is \$250 = Available - minimum investment is \$500 O = Available - minimum investment is \$1,000 = Available - minimum investment is \$5,000 = market value adjustments may apply 1 Future Investment Protection and Secured Manulife Security Limited Investment account name InnoVision UltraVision **UL100** Navi-vision account Pay UL ш UL code Protection **Simple Interest GIAs** GIA - S1 1 year simple ✓ N/A 0 N/A N/A 0 N/A N/A GIA - S2 2 year simple ✓ N/A N/A N/A N/A N/A N/A N/A 0 N/A N/A N/A N/A GIA - S3 3 year simple ✓ N/A 0 GIA - S4 4 year simple ✓ N/A N/A N/A N/A N/A N/A N/A GIA - S5 5 year simple 🗸 N/A 0 N/A N/A 0 N/A N/A GIA - S10 N/A N/A N/A 10 year simple 🗸 N/A 0 N/A N/A GIA - S20 N/A 0 N/A N/A N/A N/A N/A 20 year simple ✓ **Compound Interest GIAs** GIA - C1 1 year compound ✓ 0 N/A N/A N/A N/A N/A N/A GIA - C3 N/A 3 year compound ✓ Ο 0 GIA - C5 5 year compound ✓ 0 N/A 0 GIA - C10 10 year compound ✓ 0 N/A N/A 0 GIA - C1 to Select from N/A N/A N/A N/A N/A N/A N/A GIA - C10 1 to 10 year terms 🗸 GIA - C20 20 year compound ✓ 0 N/A N/A N/A N/A N/A N/A Daily Interest Accounts (can be used as Specified Daily Interest Accounts)

 $\Box$  = Available - no minimum investment amount

\* = In the side account, the indexed, balanced index and managed holding side accounts earn the same interest rate as the saving side account.

market value adjustments may apply

Investment account code	Investment account name	Manulife UL	InnoVision	UltraVision	Security UL	Limited Pay UL	UL100	Future Protection and Secured Protection	Navi-vision
SVG	Savings							N/A	
CIA	Current interest	N/A	N/A	N/A	N/A	N/A	N/A		N/A
AVGIA	Average GIA 🗸	N/A	N/A						N/A
MTPA	Mid-term Portfolio Average 🗸	N/A		N/A	N/A	N/A	N/A	N/A	N/A
LTPA	Long-term Portfolio Average 🗸	N/A		N/A	N/A	N/A	N/A	N/A	N/A
CBALI	Conservative Balanced Index*					N/A			
MBALI	Moderate Balanced Index*					N/A			

#### Daily Interest Accounts (can be used as Specified Daily Interest Accounts) (continued)

- $\Box$  = Available no minimum investment amount
- \* = In the side account, the indexed, balanced index and managed holding side accounts earn the same interest rate as the saving side account.
- ✓ = market value adjustments may apply

Investment account code	Investment account name	Manulife UL	InnoVision	UltraVision	Security UL	Limited Pay UL	UL100	Future Protection and Secured Protection	Navi-vision
GBALI	Growth Balanced Index*					N/A			
CDNEI	Canadian Equity Index*				N/A	N/A	N/A		
SMA	Stock market	N/A	N/A	N/A	N/A	N/A		N/A	N/A
CDNBI	Canadian Bond Index*				N/A	N/A	N/A	N/A	
AMEI	American Equity Index*				N/A	N/A			
AMTEI	American Technology Equity Index*	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
EUROEI	European Equity Index*				N/A	N/A	N/A	N/A	
JAPEI	Japanese Equity Index*				N/A	N/A	N/A	N/A	
G5	G5 Index*				N/A	N/A			
GLEI	Global Equity Index*				N/A	N/A		N/A	

### **Managed Accounts**

 $\Box$  = Available - no minimum investment amount

\* = In the side account, the indexed, balanced index and managed holding side accounts earn the same interest rate as the saving side account.

Note: Available products for managed accounts are listed beside the account name. If your product is not listed, these accounts are unavailable.

Investment account code	Investment account name	Manulife UL	InnoVision	UltraVision	Limited Pay UL	UL100
MA452	Invesco Canadian Premier Growth Class*				N/A	N/A
MA453	Invesco Canadian Balanced*				N/A	N/A
MA504	CI Signature Income & Growth*				N/A	N/A
MA505	CI Canadian Investment*				N/A	N/A
MA506	CI Signature Canadian Balanced*				N/A	N/A
MA507	CI Sentry U.S. Growth and Income*				N/A	N/A
MA510	Dynamic Value Balanced*				N/A	N/A
MA511	Dynamic Value Fund of Canada*				N/A	N/A
MA512	Dynamic Power Canadian Growth*				N/A	N/A
MA521	Manulife Emerging Markets*				N/A	N/A
MA524	Manulife Yield Opportunities*				N/A	N/A
MA526	Manulife Growth Opportunities*				N/A	N/A
MA530	Manulife Monthly High Income*				N/A	N/A
MA532	Manulife Corporate Bond*				N/A	N/A
MA534	Manulife Fundamental Equity*				N/A	N/A
MA535	Manulife Canadian Investment Class*				N/A	
MA536	Manulife Diversified Investment*				N/A	N/A
MA537	Manulife Global Small Cap*	N/A			N/A	N/A
MA538	Manulife U.S. Equity*				N/A	N/A
MA539	Manulife World Investment Class*				N/A	
MA540	Manulife Strategic Income*				N/A	N/A
MA541	Manulife Strategic Balanced Yield*				N/A	N/A

### Managed Accounts (continued)

- $\Box$  = Available no minimum investment amount
- \* = In the side account, the indexed, balanced index and managed holding side accounts earn the same interest rate as the savings side account.

Investment account code	Investment account name	Manulife UL	InnoVision	UltraVision	Limited Pay UL	UL100
MA543	Manulife Dividend Income*			N/A	N/A	N/A
MA544	Manulife U.S. All Cap Equity*				N/A	N/A
MA545	Manulife Global Equity Class*			N/A	N/A	N/A
MA546	Manulife U.S. Monthly High Income*			N/A	N/A	N/A
MA547	Manulife Global Balanced*			N/A	N/A	N/A
MA548	Manulife Strategic Investment Grade Global Bond*			N/A	N/A	N/A
MA550	Fidelity Canadian Large Cap*				N/A	N/A
MA551	Fidelity Europe*				N/A	N/A
MA552	Fidelity U.S. Focused Stock*				N/A	
MA553	Fidelity Global*				N/A	N/A
MA554	Fidelity True North*				N/A	N/A
MA555	Fidelity Canadian Bond*				N/A	N/A
MA556	Fidelity Monthly Income*				N/A	N/A
MA557	Fidelity Emerging Markets*				N/A	N/A
MA560	Mackenzie Cundill Value*				N/A	N/A
MA561	Mackenzie Ivy Foreign Equity*				N/A	
MA562	Mackenzie Canadian Large Cap Dividend & Growth*				N/A	
MA565	Mackenzie Canadian Resource*				N/A	N/A
MA566	Mackenzie Canadian Growth*				N/A	N/A
MA570	TD Dividend Income*				N/A	N/A
MA600	Invesco Select Canadian Equity*				N/A	N/A
MA601	Invesco Global Diversified Companies*				N/A	N/A
MA806	Manulife Conservative Portfolio*					
MA807	Manulife Moderate Portfolio*					
MA808	Manulife Balanced Portfolio*					
MA809	Manulife Growth Portfolio*					