Manulife Investment Management

Frequently asked questions

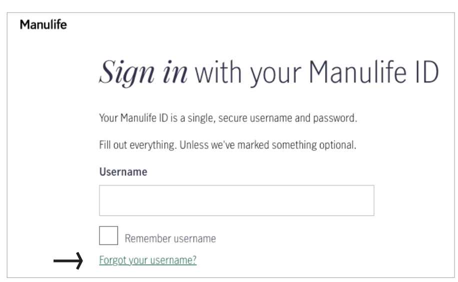
Accessing Manulife online access

What is a Manulife ID?

A Manulife ID is your username and password that gives you access to Manulife products such as Manulife Investment Management, Manulife Securities, and Manulife Vitality, and more are coming.

Do I have a Manulife ID?

If it's been a while since you signed in, or if you may not remember or don't know if you have a Manulife ID, here's a tip to help you. Make sure you're signed out of any Manulife digital platform, then click **Forgot your username**. If you have a Manulife ID, you'll receive an email in less than five minutes. **(Video tip here)**



After I completed registration, I wasn't able to sign in.

The final step required to complete your Manulife ID registration is to click the **Activate** button that you'll find in an automated email you received from Manulife. This button must be clicked in less than 15 minutes of receiving the email. If 15 minutes passes and you didn't click the **Activate** button in the email, you'll need to re-register.

Faster.
Easier.
Safer.

I didn't receive an activation email.

The activation email is automated. It's sent instantly as soon as the last step of Manulife ID setup is completed. If you don't see the email in your inbox, be sure to check your promotional, junk, and spam email folders. The activation email will arrive in less than five minutes.

I'm not able to sign in—I'm locked out.

This can happen after three unsuccessful password attempts. To unlock your account, click **Forgot your password**. A one-time code will be sent to you either through mobile text (if you set this up) or email (the default).

I didn't receive a one-time code. What do I do?

1. Check your junk, promotional, and spam folders to see if the code was accidently sent there.
2. Make sure you're connected to the internet.

If you still haven't received your one-time code, reach out to our contact centre.

Tip: If you requested multiple verification passwords, only the newest one works. A one-time code expires in 15 minutes. **(Video tip here)**

How often will I be required to use a one-time code?

We require you to use the one-time code to make sure it's really you—for example, when you:

- set up your account
- log in from a device we don't recognize
- use a new or updated browser
- add a new mobile number
- click **Forgot your password**
- click **Forgot your username**
- have a new geolocation
- haven't signed in for a while.

Can my partner and I share the same ID?

No, a Manulife ID should remain confidential and not be disclosed to anyone. Full site terms and conditions are available **here**.

What if I don't want to provide an email address to set up my Manulife ID?

An email address is mandatory for Manulife ID setup. This is for security reasons, such as two-factor authentication and account recovery. Two users can register separately with the same email.

Can I use the same email address as my partner?

Yes, you can. We have updated our registration process to allow more than one user to register with the same email address.

Will my Manulife ID password expire?

No, we use two-factor authentication to make sure it's really you who's signing in.

Do I need to sign out?

Yes, it's recommended. Click the top right profile button and you'll see a sign-out option. Alternatively, you can close your browser windows.

How long will the system keep me signed in?

The system will automatically sign you out if there's no activity after 15 minutes.

Activating products

Why can't I see my products?

Once your registration is complete, the next step is to enter your postal code. This will validate that you have a Manulife Investment Management product. Once successful, you'll be taken to the Manulife online access dashboard where you'll validate your product with an account number (which can be found on your statement) and your social insurance number. **(Video tip here)**

Why hasn't my Manulife Investment Management account activated?

Once you've correctly entered your account number and the last four digits of your social insurance number, it'll take 24 hours for your mutual funds and segregated fund contracts to be accessible. We'll send you an email letting you know they're ready to access. **(Video tip here)**

My Manulife Investment Management tile is still grey after I validated my account.

If you've correctly input your account information and social insurance number, it will take 24 hours for your investment tile to activate. If after 24 hours your investment product tile hasn't activated, **contact us** and we'll help you.

What is the verification code, and when is it needed?

A verification code is a unique code required in two scenarios:

- To allow authorized individuals to register for Manulife online access
- When a customer doesn't want to enter the last four digits of their SIN.

How do I receive a verification code?

Customers can obtain their verification code by calling the **contact centre**.

If you have any questions, **contact us** and we'll help you.

If I have a Manulife ID, what products can I access with it?

Manulife ID will currently connect your segregated fund contracts and/or mutual fund holdings with Manulife Investment Management, Manulife Securities, and Manulife Vitality, products, with more products coming online soon.

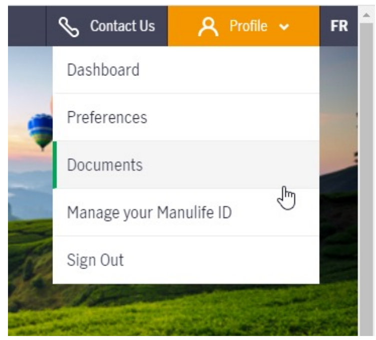
Can I switch between my Manulife Investment Management and Securities accounts without having to sign in twice?

Yes, Manulife ID allows Manulife customers with multiple accounts to switch between products by clicking **Switch products** in the top right-hand menu bar.

Using Manulife online access

Where do I find my documents?

Click **Profile** in the top right menu bar to see a drop-down menu, then select **Documents**. This is the document centre where you can find your confirmations, statements, and tax slips (if you're a Securities customer).



Now that I'm registered, will I receive all my documents electronically?

No. As a Manulife Investment Management customer, after registering, you'll receive your mid-year and annual statement electronically. However, you must change your preferences by clicking **Profile** in the top right menu, then clicking **Preferences** and choosing your investment document delivery method.

I have several segregated fund contracts or mutual fund accounts and I can't see all of them.

If you have more than four accounts, a drop-down menu will appear on the right side. When you click the drop-down menu, you'll be able to see all your accounts.

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