

## Interfund transfer for existing assets

Please print clearly in the blank boxes.

You may also provide transfer instructions online at [www.manulife.ca/GRO](http://www.manulife.ca/GRO) or by calling Customer Service at 1-888-727-7766.

This form is also available online at [www.manulife.ca/GRO](http://www.manulife.ca/GRO)

### Your personal information

Plan Sponsor/Employer			Group Policy number		
Member number		Customer number		Reference number <b>Manulife Financial Use Only</b>	
Last name			First name		Middle initial
Mailing address (number, street and apartment number)					
City	Province	Country	Postal Code	Telephone number*	Ext*
Email address (if applicable)*					

\*These fields are optional.

### Your transfer between investments

Interfund transfers will be processed using the next available unit value\*. Unit values are declared after the market close each business day. Interfund transfers received after 4:00 pm EST will be processed using the unit values declared at the end of the next business day.

\* All transactions involving funds that invest primarily outside of North America will be processed on the second business day. This allows for time zone differences and ensures that unit values reflect the most current market activity.

**Transfer minimum of 5% per fund, whole numbers only. Total of all funds being transferred must equal 100%.**

Please enter the fund code for all funds. Fund code names and details appear online at [www.manulife.ca/GRO](http://www.manulife.ca/GRO) or in the Group Investment Report. Investments transferred from the Guaranteed Interest Accounts (GIAs) before maturity may be subject to a market value adjustment. A 2% frequent trading fee may apply to interfund transfers into a fund, then out of the same fund within 15 calendar days.

#### Group IncomePlus information

If your plan offers Group IncomePlus note this option is intended to provide you with guaranteed retirement income. Before you select Group IncomePlus, learn more by logging into your account at [www.manulife.ca/GRO](http://www.manulife.ca/GRO).

If you transfer funds to your existing Group IncomePlus, please remember that a contribution exceeding 20% of your Guaranteed Benefit Base will reset your Minimum Five (5) Year Holding period whether you make one large contribution or a series of smaller transfers and contributions over a 365 day period.

Interfund transfers from Group IncomePlus will reduce your Guaranteed Benefit Base and the Guaranteed Annual Income Amount it will provide. If the amount of the interfund transfer is more than your Guaranteed Benefit Base, a Freeze Period will begin. You will not be able to make any Occasional Contributions to Group IncomePlus until this period concludes.

#### Contribution source:

All  Member Required  Plan Sponsor Required  Member Voluntary  Plan Sponsor Supplementary (Voluntary)

From: Fund Code

	%	or	\$
	%	or	\$
	%	or	\$
	%	or	\$
	%	or	\$
	%	or	\$
	%	or	\$
	%	or	\$
	%	or	\$
	%	or	\$
	%	or	\$

To: Fund Code

	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%

**Must equal 100%**

## Your transfer from a Guaranteed Interest Account (GIA)

When do you want to transfer?  Immediately  At maturity

Investments transferred from Guaranteed Interest Accounts (GIA's) before maturity may be subject to a market value adjustment.

**NOTE:** You must transfer 100% of any specific GIA.

Group IncomePlus is not an available option for maturing GIA's.

**From:** Fund code

	% <b>OR</b> \$
Maturity amount \$	Maturity date (dd/mmm/yyyy)

	% <b>OR</b> \$
Maturity amount \$	Maturity date (dd/mmm/yyyy)

**To:** Fund code

	%
Maturity amount \$	Maturity date (dd/mmm/yyyy)

	%
Maturity amount \$	Maturity date (dd/mmm/yyyy)

Do you want these instructions to apply to all GIA's matching this investment code?  Yes  No

If no, please specify which GIA you would like your instructions applied to by completing below:

Maturity amount \$	Maturity date (dd/mmm/yyyy)
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## Please sign here

Manulife Financial reserves the right to return incomplete forms, or forms that have been filled out incorrectly. You will receive written confirmation once your transaction(s) have been processed. In the event that there was an error made processing your transaction, you have thirty days to notify Manulife Financial upon receipt of confirmation.

If I am transferring Group IncomePlus investments, I understand that this transaction will affect my Group IncomePlus benefits.

Your signature	Date signed (ddd/mm/yyyy)
Plan Administrator's signature (if required)	Date signed (ddd/mm/yyyy)

## Mailing instructions

Send your completed forms to the address below.

**If you live outside of Quebec:**

**Manulife Financial**  
Attn: GRS Client Services  
P.O. Box 396  
Waterloo, ON N2J 4A9

**If you live in Quebec:**

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