Manulife Financial

For your future™

Interfund transfer for existing assets

Send your completed form to:

Boilermakers' Benefit Administration Office
2255 Sheppard Ave. E, Atria 1, Suite 201
Toronto, ON M2J 4Y1

Please print clearly in the blank boxes.

You may also provide transfer instructions online at 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

Your personal information

Plan Sponsor/Employer				Group Policy number	
Member number	Customer number			Reference number Manulife Financial Use Only	
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 or in the Group Investment Report. Investments transferred from the Guaranteed Interest Accounts (GIA's) 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.

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				**To:** Fund Code	
	%	or	$		%
	%	or	$		%
	%	or	$		%
	%	or	$		%
	%	or	$		%
	%	or	$		%
	%	or	$		%
	%	or	$		%
	%	or	$		%
	%	or	$		%

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		**To:** Fund code	
	% ***OR*** $		%
Maturity amount $	Maturity date (dd/mmm/yyyy)	Maturity amount $	Maturity date (dd/mmm/yyyy)
	% ***OR*** $		%
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)

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)