

Annual REVIEW check list

Before starting your annual review, gather the items listed below. This will help make the process as quick and effective as possible. Check off each item as you go:

1 Your most recent Manulife group member statement

2 Your most recent Notice of Assessment for your annual income from all sources from the Canada Revenue Agency (CRA)

3 Everything you need to sign in to your Manulife online member account (User ID and password)

4 Statements for investments and accounts outside your current Manulife group retirement plan that show your current balance and annual contributions:

- Savings accounts
- Personal RRSPs
- Group retirement plan accounts from previous employers
- Mutual funds
- Stocks and bonds
- Annuities
- Estimates for other retirement income you expect (Defined Benefit plan or rental income)

Once you've gathered these items, sign in to your online member account at manulife.ca and review the following:

- **Check your personal information.**
- **Have you joined all available plans?**
- **Are you maximizing your contributions?**
- **Are you on track for retirement?**
- **Are you comfortable with your investment choices?**