

# Enrolment checklist

The enrolment checklist was designed to help you ensure that all required information is completed before sending the enrolment forms to us. Keep it handy.

## Activity

- Provide employee with an enrolment package
- Set up the member for enrolment using the *Pre-enrolment* feature of the VIP Room for plan sponsors
- Receive enrolment forms completed and signed by the employee (and employee's spouse, when applicable)

## Verify eligibility of employee (please refer to your plan rules):

- Permanent employee of your company
- Employee works the minimum number of hours specified in the plan rules
- Employee has completed the eligibility period required under the plan rules

**Important note:** • *Outside of Québec, applicants must fill out the Enrolment form for applicants in all provinces except Québec.*  
• *Québec applicants must fill out the Enrolment form for Québec applicants only.*

## To be completed by the plan sponsor (shaded area at the top of the enrolment form)

- Date of employment
- Date joined plan
- Province of employment (when applicable)
- Subgroup no.
- Employee class (when applicable)
- Certificate no. (when applicable)
- Signature, name in block letters and date

## To be completed by the employee

- Step 1 – Employee information
- Step 2 – Beneficiary information
- Step 3 – Payroll deduction request
- Step 4 – Please sign
- Step 5 – Investment instructions
- Step 6 – Please sign

*For spousal RRSPP and spousal STRP (to be completed by the employee and employee's spouse)*

## Employee

- Step 1 – Employee information
- Step 2 – Contribution allocation instruction
- Step 3 – Please sign – employee's signature

## Spouse

- Step 4 – Spousal information
- Step 5 – Beneficiary information
- Step 6 – Please sign – spouse signature
- Step 7 – Investment instructions
- Step 8 – Please sign – spouse signature

## Forward all original completed enrolment forms to us at:

The Manufacturers Life Insurance Company  
Group Savings and Retirement  
Client number (RS\_ \_ \_ \_ \_)  
PO BOX 11464 SUCC CENTRE VILLE  
Montréal, QC H3C 5M3

*For faster processing, be sure to indicate your client number (RS\_ \_ \_ \_ \_) on all correspondence.*