

Advisor VIP Room website registration and request for access

Group Savings & Retirement

GE11986B

Section 1 - Agent of record (principal firm or individual named on your license)

Select one code:

Firm advisor Individual advisor

Manulife sales office

Calgary Halifax London Montréal Québec Toronto Vancouver

Principal firm (Note: The firm primary contact is as specified in section 2.)

Individual – Last name First name

Gender Male Female Language of correspondence French English

Title Organization

Business address (no., street, suite)

City Province Postal code

Telephone no. Fax no. Email

Firm	OR	individual	Advisor code	Firm name	Last name	First name
<input type="checkbox"/>		<input type="checkbox"/>				
<input type="checkbox"/>		<input type="checkbox"/>				
<input type="checkbox"/>		<input type="checkbox"/>				

Please indicate any alternative individual or firm licenses that you use to place group savings and retirement business, and require access within the advisor VIP Room.

Section 2 - Designated representative with primary Web access (advisor Internet authorized signing officer)

Same as individual agent of record named under section 1 (Web access can only be provided to an individual person and not a firm.)

Last name First name

Gender Male Female Language of correspondence French English

Title Organization

Business address (no., street, suite)

City Province Postal code

Telephone no. Fax Email

Full access to the VIP Room provides consolidated view of asset under management and commissions paid to the firm or individual agent. The following primary contact is authorised to assign access to other parties within the firm or the individual agent's employ.

(continued on next side)

Section 3 - Manulife Group Savings & Retirement client listing

Access to the advisor VIP Room will be granted to all clients for which the firm or individual is the agent on record. Please note that the advisor VIP Room only displays high-level client information. Access to client and member specific information must be authorized by the plan sponsor for each client. If you do not currently have access to the detailed information for a specific client, you must have the plan sponsor sign an authorization form to grant you permission.

Client no.	Client name
RS	
RS	
RS	
RS	
RS	

Please include below any additional clients for whom you provide services but for which you may not necessarily be the agent on record. You must also include a plan sponsor authorization form for these clients.

Section 4 - Additional Web access

Access to all clients under section 3 **OR** Access to specific clients – please specify each client

Last name First name

Gender Male Female Language of correspondence French English

Title Organization

Same address as under section 1

Business address (no., street, suite)

City Province Postal code

Telephone no. Fax Email

Type of access – Please select all that apply:

- Advisor basic – Allows user to access clients assets under management, promotional material and useful tools and links
- Commission – Allows user to access commission reports and details on accrued commissions
- Plan sponsor for advisor basic* – Allows user access to download and view client specific reports
- Account query (not applicable for DB plans)* – Allows user to view personal information on members

Client access

Client no.	Client name	Plan sponsor for advisor basic	Account query
RS			
RS			

Please indicate any additional Web access that is required for your firm. This representative is NOT authorised to assign access to others. It's important to note that access to member's personal information should be limited to persons for whom the information is necessary to perform their duties. In certain circumstances, such information may be nice to have, but this is not sufficient reason to allow access to it. Before you grant access to other users, you must determine whether they would still be able to perform their duties should they not have access to this site. If this is the case, we strongly recommend you do not grant them access. It is also your responsibility to promptly advise us of any modifications including removal of access.

* Access will only be given for clients for whom the plan sponsor has granted authorization to the agent of record.

Section 4 - Additional Web access

Access to all clients under section 3 **OR** Access to specific clients – please specify each client:

Last name First name

Gender Male Female Language of correspondence French English

Title Organization

Same address as under section 1

Business address (no., street, suite)

City Province Postal code

Telephone no. Fax no. Email

Type of access – Please select all that apply:

- Advisor basic – Allows user to access clients assets under management, promotional material and useful tools and links
- Commission – Allows user to access commission reports and details on accrued commissions
- Plan sponsor for advisor basic* – Allows user access to download and view client specific reports
- Account query (not applicable for DB plans)* – Allows user to view personal information on members

* Access will only be given for clients for whom the plan sponsor has granted authorization to the agent of record.

Client access

Client no.	Client name	Plan sponsor for advisor basic	Account query
RS			
RS			

Signature

As the advisor Internet authorized signing officer, I hereby authorize the above-stated individual(s) to access all authorized clients' plan and subgroup information provided on the Manulife Group Savings & Retirement advisor, plan sponsor and member VIP Rooms and I accept responsibility for any misuse of information that may occur as a result of this access.

As the primary contact (advisor Internet authorized signing officer), I hereby agree and accept the following:

- I shall promptly advise Manulife in writing of any changes with respect to any advisor's authorization to view plan and member information.
- I accept responsibility for any misuse of information by the authorized advisor(s), if applicable.
- I accept that Manulife may change any or all of the services provided by the Manulife GS&R VIP Rooms at any time, with or without notice. The Manulife GS&R VIP Rooms may be periodically be unavailable in order to allow for maintenance or other reasonable cause.
- I will only grant access to the advisor, plan sponsor and member VIP Rooms to persons who require access for the purpose of the plan.

Signature of advisor Internet authorized officer

Title Name (please print)

Signed at Date

Disclaimer: While every effort has been made to ensure the accuracy of the information contained in the VIP Room, no warranty is expressed or implied as to the accuracy, adequacy or completeness of the information, and Manulife is not responsible for any errors, omission or results obtained from the use of such information.

manulife.ca



Manulife, Manulife Insurance, the Block Design, the Four Cube Design, and Strong Reliable Trustworthy Forward-thinking are trademarks of The Manufacturers Life Insurance Company and are used by it, and by its affiliates under licence.

GE11986B SLX GS 03/17