

Customized eStatements

With the new innovative and user-friendly features, your members can now tailor their *Plan for life™* eStatements to their needs. All they have to do is visit their VIP Room home page and click on the *Statements* link in the *View your holdings* box.

Statement history

This section provides the ability to view all statements kept on the site over the past three years. For each statement, the issue date, period, statement type – regular (periodic), ad-hoc or customized (Web) – and communication material, if any, are displayed.

Clicking on a link in the *Period* column opens the statement in PDF format.

Clicking on a link in the *Inserts* column shows a PDF of the communication material sent with each statement.

Statement history

You may view, print and save your statements by clicking on the desired period. You may also view the inserts included with your statement, if applicable.

| Date issued | Period | Statement type | Inserts |
|-------------------|--|----------------------|---------|
| March 19, 2014 | From April 01, 2008 to June 30, 2008 | Regular statement | |
| March 19, 2014 | From January 01, 2008 to June 30, 2008 | Regular statement | |
| March 19, 2014 | From January 01, 2008 to June 30, 2008 | Regular statement | |
| November 19, 2009 | From January 01, 2003 to May 13, 2003 | Compliance statement | |

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Customized eStatements

This section allows members to perform three actions: request an eStatement, select another eStatement package and build their own eStatement. In all cases, they may request an ad-hoc eStatement for any period, for one plan or all plans under their program.

Request an eStatement

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*** Required information**

Your plan sponsor has selected a *Basic* statement package with the following information:

- Your name and address
- Your group program at a glance
 - Your assets at a glance
 - Your personal rates of return
- Your Retirement checkup™
- Information about your plan
 - Your asset breakdown by category
 - Your plan assets at a glance
 - Your plan assets by account
 - Details on your assets and investments
 - Your investment allocation mix
- Your personal information
- Your beneficiary information

Select your plan(s), period start and end date of your eStatement request.

Plan(s) * ?

Period start date *

Period end date *

Save a copy of your eStatement. ?

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What the eStatement includes

The eStatement normally displays information on all plans, but it is possible to display information on one particular plan.

Members may indicate the period start and end dates they want their statement to cover.

This box is checked by default, but members can uncheck it if they do not want to save a copy of their eStatement in *Statement history* for future reference.

Clicking *Submit* automatically generates the eStatement in PDF format.

Select another eStatement package

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Request an eStatement
Select another eStatement package
Build your own eStatement

* Required information

Step 1: Select from the following eStatement packages. *

| Packages | Select package | View sample |
|--|-----------------------|-----------------------------|
| + Basic | <input type="radio"/> | n/a |
| + Performance | <input type="radio"/> | n/a |
| + Basic without personal information | <input type="radio"/> | n/a |
| + Retirement planning | <input type="radio"/> | n/a |
| + Detailed transactions | <input type="radio"/> | n/a |
| - Executive summary <ul style="list-style-type: none"> • Your name and address • Your group program at a glance • Your assets at a glance • Your personal rates of return | <input type="radio"/> | View sample |

Click on [View sample](#) to view a sample statement package. You can delete any customized statements you have saved under *Build your own eStatement* by clicking on [Remove](#).

Step 2: Select your plan(s), period start and end date of your eStatement request.

Plan(s) * All your plans [?](#)

Period start date * [?](#)

Period end date * [?](#)

Save a copy of your eStatement. [?](#)

[Reset](#) [Submit](#)

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Customized package that the member creates

List of predefined packages

It is possible to delete customized packages.

Links to samples of predefined packages

Build your own eStatement

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Request an eStatement
Select another eStatement package
Build your own eStatement

* Required information

Step 1: Select your starting point. *

I want to build my eStatement from scratch.
 I want to build my eStatement using the following package as my starting point. Select a package

Step 2: Select from the following eStatement package elements. *

| eStatement elements | Add element |
|--|--------------------------|
| Your name and address | ✓ |
| Your group program at a glance | ✓ |
| Your assets at a glance | ✓ |
| Your personal rates of return | <input type="checkbox"/> |
| Your Retirement checkup™ | <input type="checkbox"/> |
| Your detailed transactions, maturities and reinvestments | <input type="checkbox"/> |
| Your asset breakdown by category | <input type="checkbox"/> |
| Your plan assets at a glance | <input type="checkbox"/> |

✓ These elements cannot be removed from your eStatement.

Save my customized eStatement under this name: ?

Step 3: Select your plan(s), period start and end date of your eStatement request.

Plan(s) * ? All your plans

Period start date * ?

Period end date * ?

Save a copy of your eStatement. ?

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Members can build their own eStatement from scratch or use a predefined package to build it.

Some elements must be included in the eStatement.

Package elements to choose from

If members would like to request their new customized eStatement again, they can save it by naming it. They can then find it in Step 1 of the *Select another eStatement package* tab.

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Statement delivery settings

In this section, your members can view the delivery settings for the statement that you (the plan sponsor) issue them and modify these settings according to their needs. As a result, they can choose to receive all their statements electronically, get paper versions or keep your selection.

The screenshot shows the 'Statement delivery settings' interface. On the left, five green callout boxes point to specific elements: 'Statement frequency' points to the 'Statement frequency' column; 'Format you chose' points to the 'Plan sponsor selection' column; 'Format the member chose' points to the 'Your selection' column; 'Available formats' points to the radio button options; and 'If members choose the electronic format, they must provide an email address. This way, they can be notified via email when their statement is available.' points to the 'email address' input field.

| Current delivery settings | | |
|---------------------------|------------------------|----------------|
| Statement frequency | Plan sponsor selection | Your selection |
| Semi-annual - June | Paper | Paper |
| Semi-annual - December | Paper | Paper |

Modify your delivery settings

I would like to receive all statements issued from my plan sponsor in this format:

- Electronic
- Paper
- Plan sponsor selection ?

email address

ⓘ If you select electronic delivery, a message will be sent to the email address you indicate above when a new statement is available. You may also update your address via the *Personal data* page. In order to receive these notification emails, please ensure these are not blocked by your anti-spam filter.

[Reset ▶](#) [Submit ▶](#)

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To discover all the enhancements made to the Customized eStatements section in the member VIP Room, visit www.manuife.ca/vipdemo/member/en today!