Customized eStatements

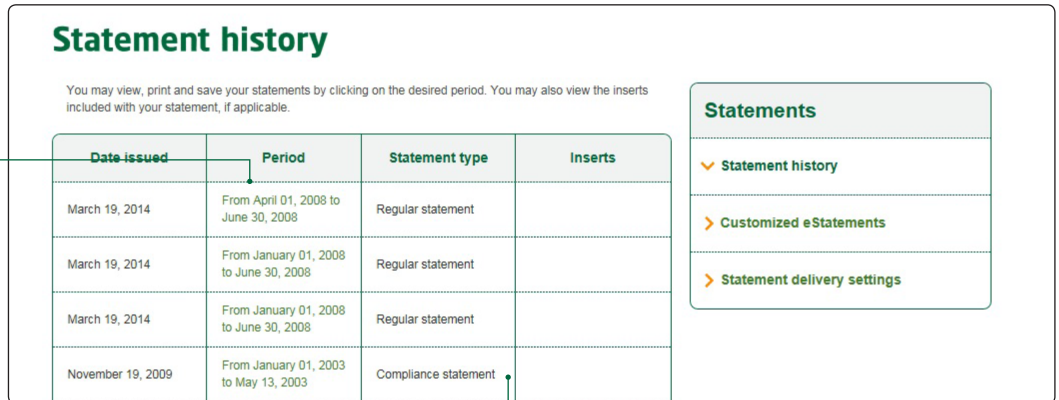
With the new innovative and user-friendly features, your members can now tailor their *Plan for life*™ eStatements to their needs. All they have to do is visit their VIP Room home page and click on the *Statements* link in the *View your holdings* box.

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.

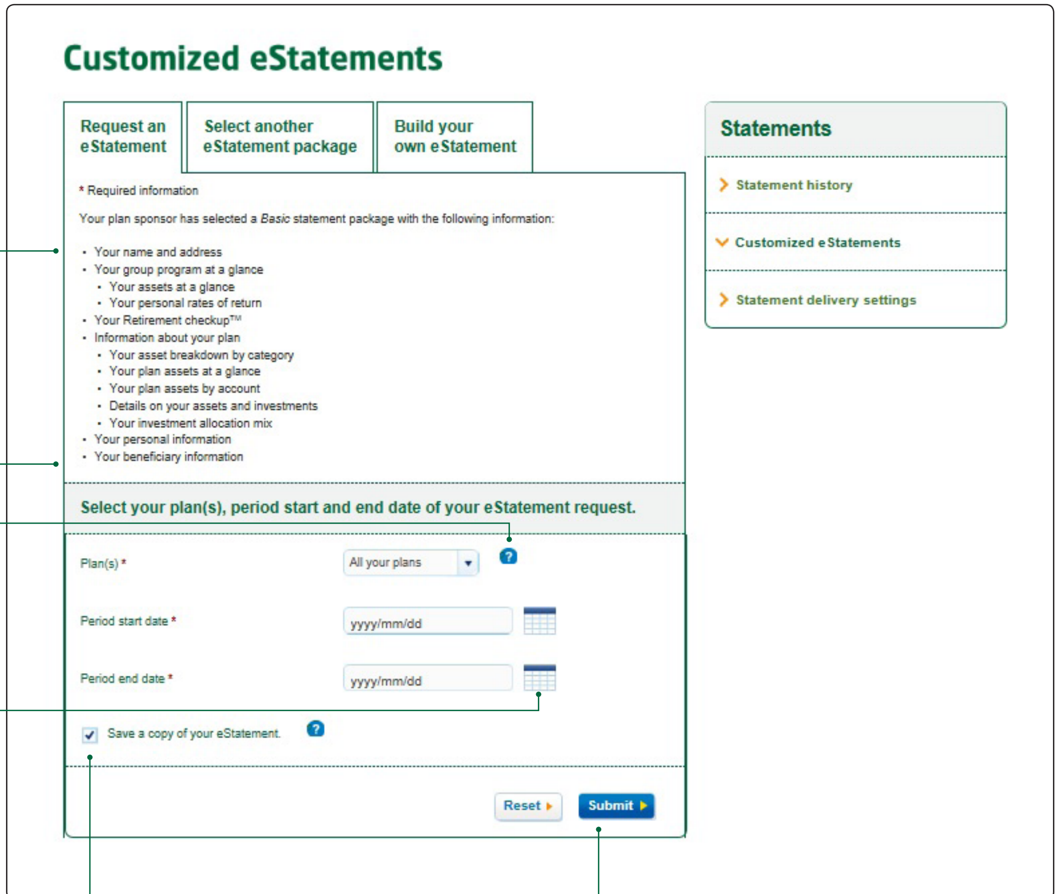


Date issued	Period	Statement type	Inserts
March 19, 2014	From April 01, 2008 to June 30, 2008	Regular statement	
March 19, 2014	From January 01, 2008 to June 30, 2008	Regular statement	
March 19, 2014	From January 01, 2008 to June 30, 2008	Regular statement	
November 19, 2009	From January 01, 2003 to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

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



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.

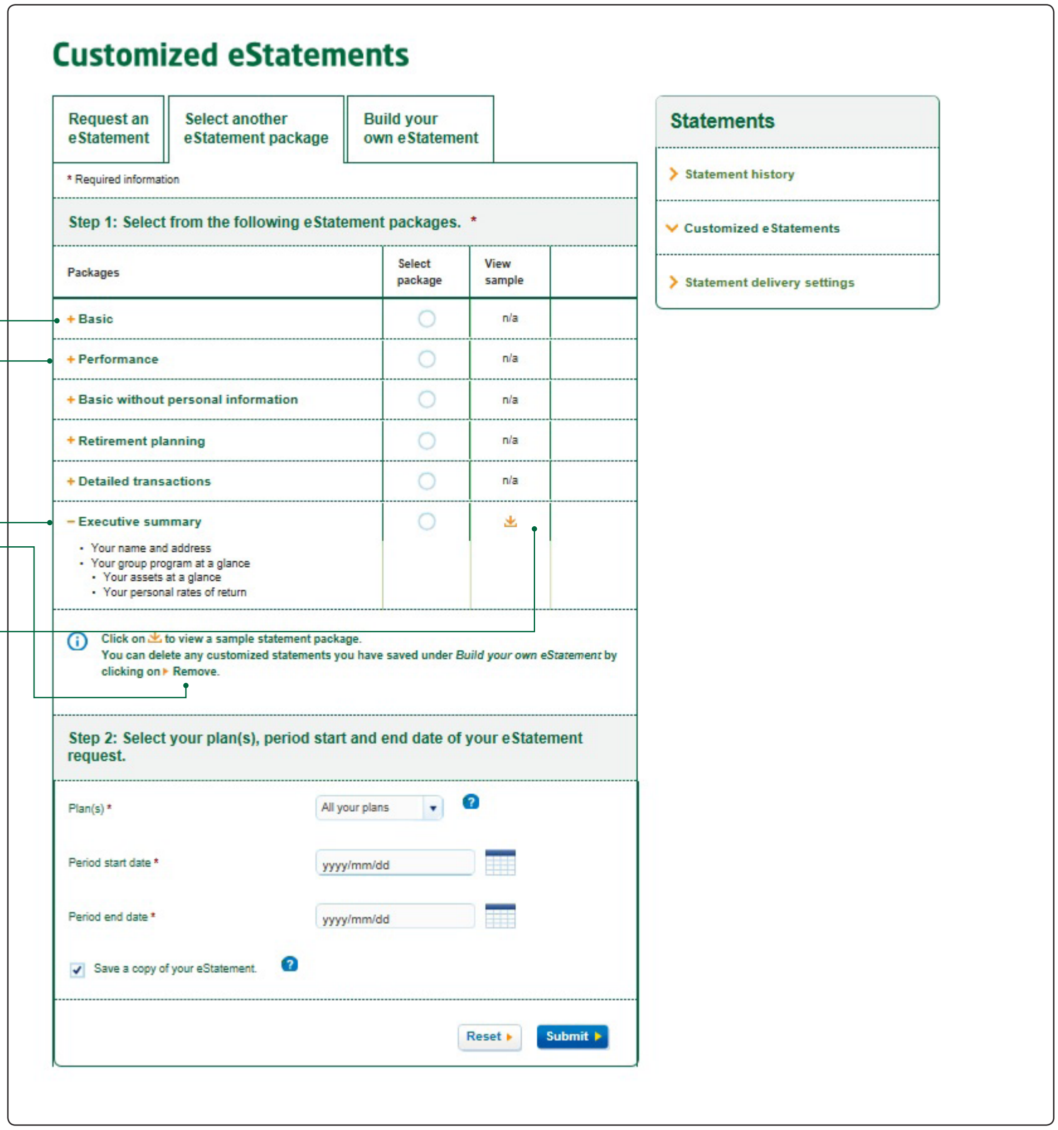
Select another eStatement package

Customized package that the member creates

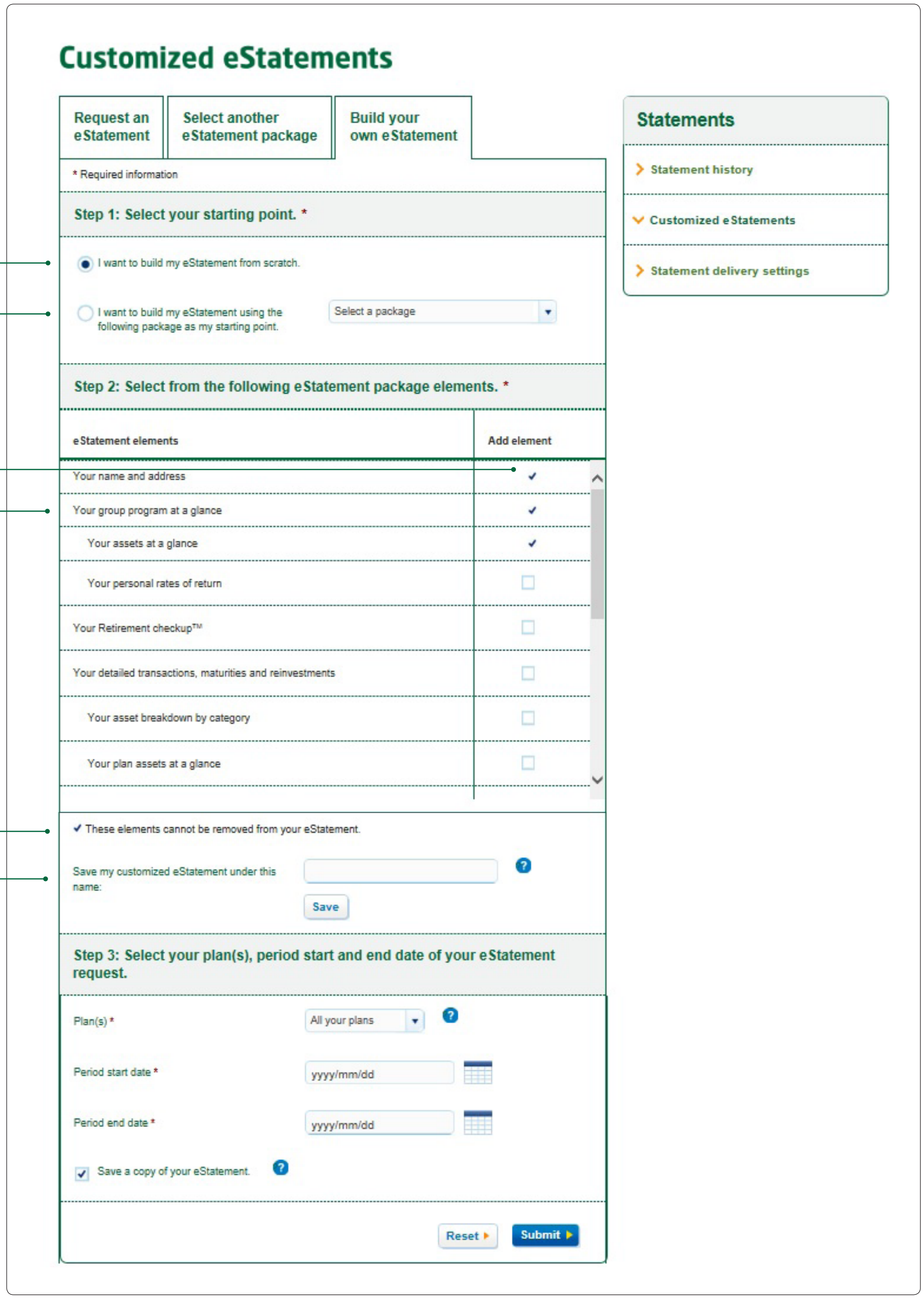
List of predefined packages

It is possible to delete customized packages.

Links to samples of predefined packages



Build your own eStatement



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

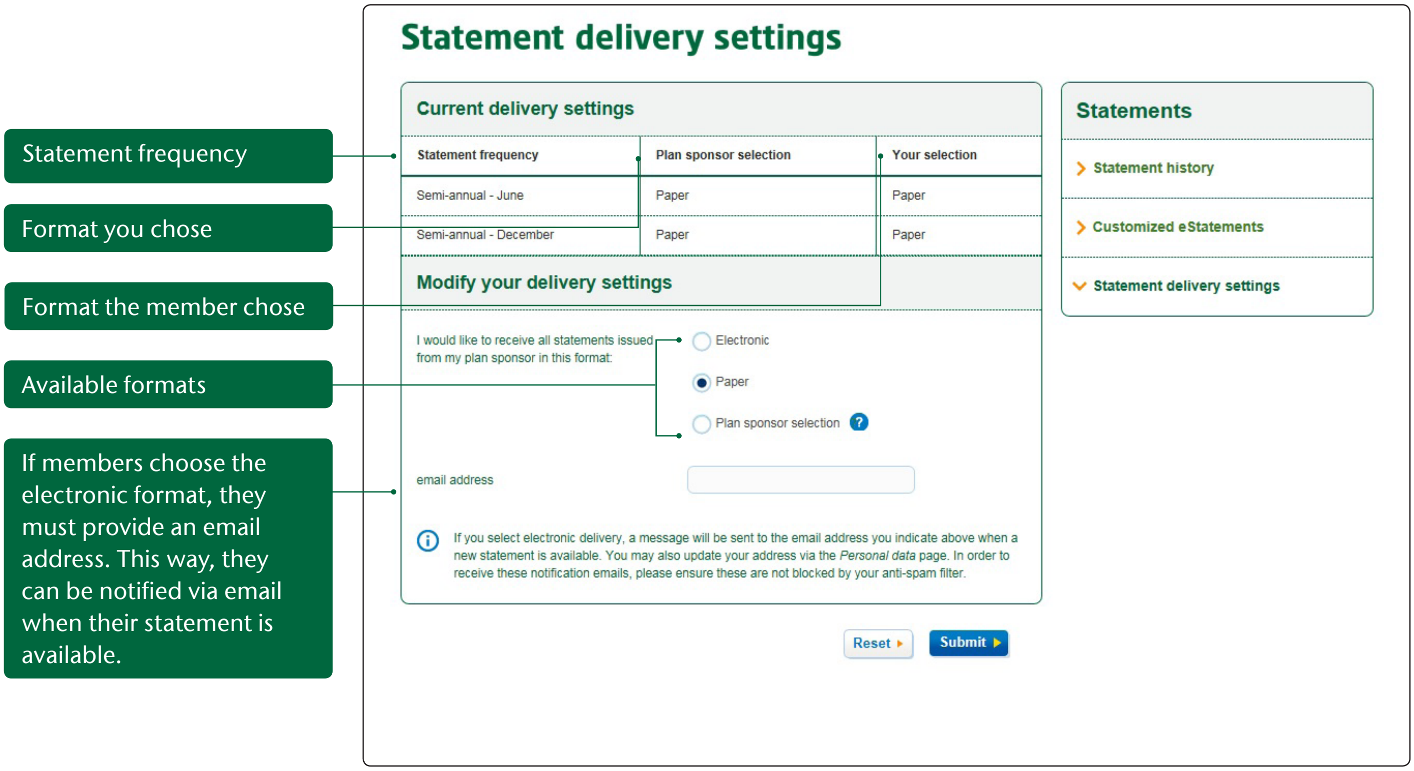
Some elements must be included in the eStatement.

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.

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.



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