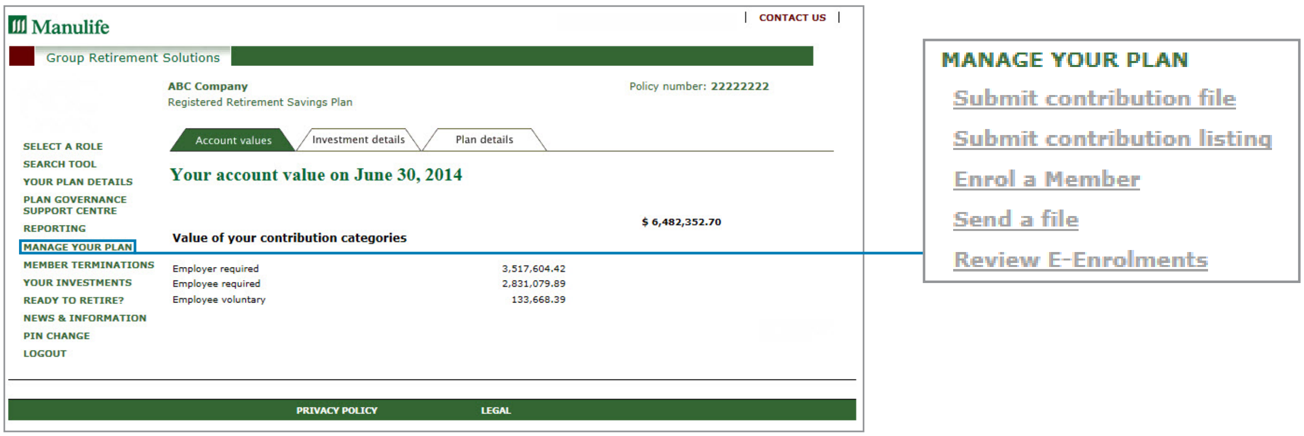
How to Enrol a plan member online

If you're ready to submit a contribution for a member who is not yet enrolled on Manulife's administrative system, use the **Enrol a member** feature on the Plan Sponsor Secure Site.

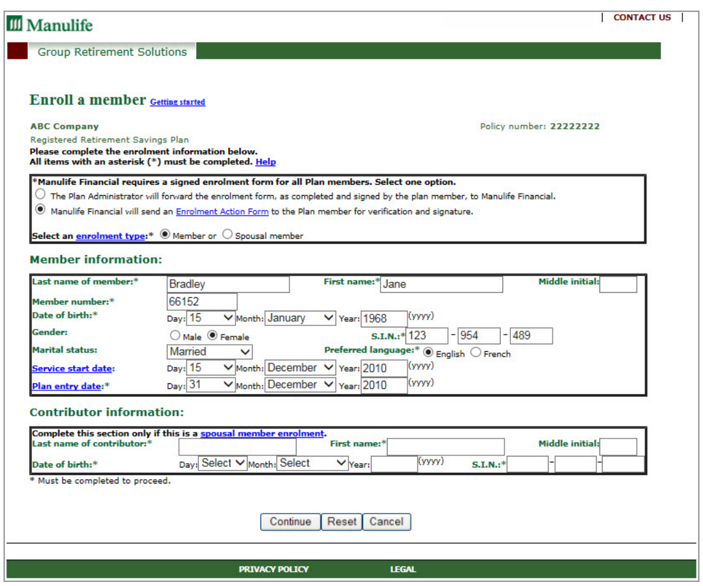
STEP 1:

Log-in to the Plan Sponsor Secure site. Select **Manage Your Plan** and then select **Enrol a Member** from the left hand menu.



STEP 2:

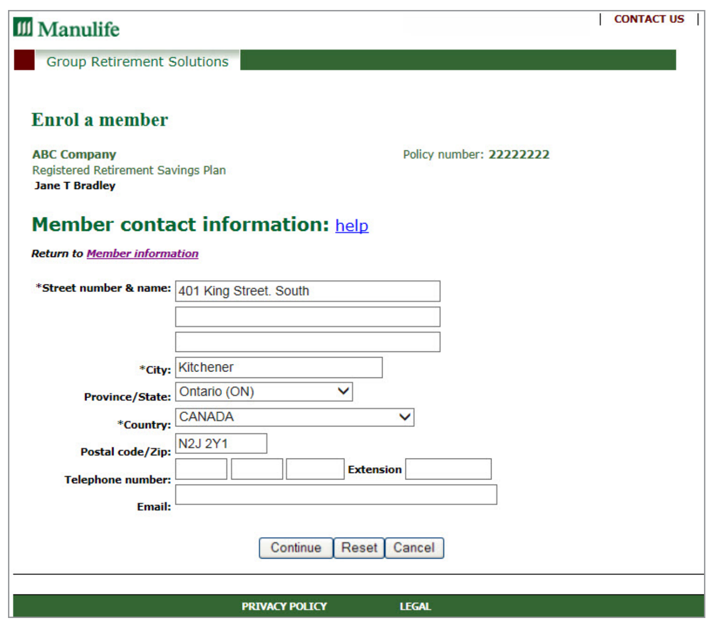
To complete the enrolment process for the member(s), enter the required information for the member.



Click **Continue** to the move to the next screen.

STEP 3:

Enter the plan member's contact information.



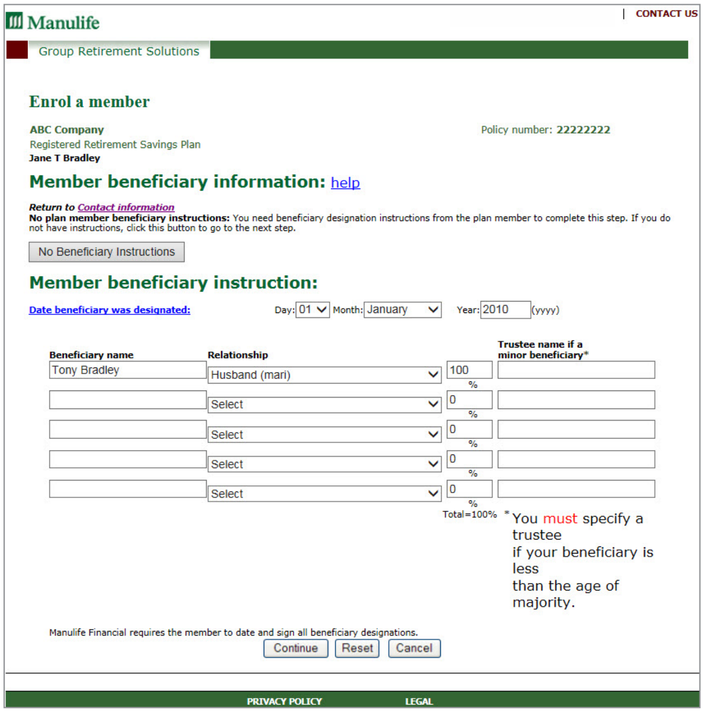
Click **Continue** to the move to the next screen.

Important note:

If you do not have a signed enrolment form from the member, select the second radio button and Manulife will mail an Enrolment Action Form to the member for verification and a signature.

STEP 4:

If you have the plan member's signed enrolment form, enter the plan member's beneficiary information. If you do not have the signed application form, click the **No Beneficiary Instructions** button.



| CONTACT US

Manulife

Group Retirement Solutions

Enrol a member

ABC Company
Registered Retirement Savings Plan
Jane T Bradley

Policy number: 22222222

Member beneficiary information: help

Return to Contact information

No plan member beneficiary instructions: You need beneficiary designation instructions from the plan member to complete this step. If you do not have instructions, click this button to go to the next step.

No Beneficiary Instructions

Member beneficiary instruction:

Date beneficiary was designated: Day: 01 Month: January Year: 2010 (yyyy)

Beneficiary name	Relationship	%	Trustee name if a minor beneficiary*
Tony Bradley	Husband (mari)	100 %	
	Select	0 %	
	Select	0 %	
	Select	0 %	
	Select	0 %	

Total=100% * You must specify a trustee if your beneficiary is less than the age of majority.

Manulife Financial requires the member to date and sign all beneficiary designations.

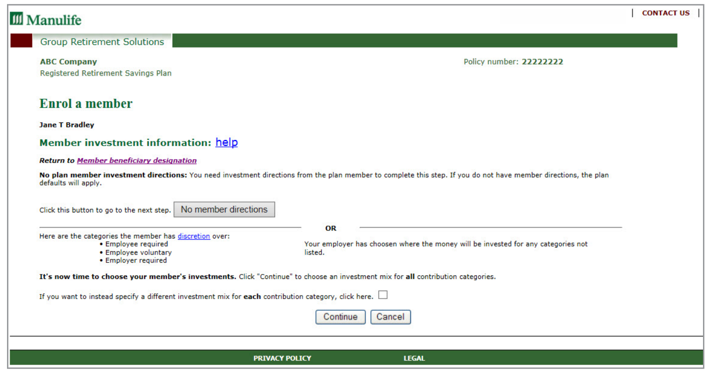
Continue Reset Cancel

PRIVACY POLICY LEGAL

Click **Continue** to the move to the next screen.

STEP 5:

Enter the plan member's investment instructions.



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Manulife

Group Retirement Solutions

ABC Company
Registered Retirement Savings Plan

Policy number: 22222222

Enrol a member

Jane T Bradley

Member investment information: help

Return to Member beneficiary designation

No plan member investment directions: You need investment directions from the plan member to complete this step. If you do not have member directions, the plan defaults will apply.

Click this button to go to the next step. No member directions

OR

Here are the categories the member has discretion over:
- Employee required
- Employee voluntary
- Employer required

Your employer has choosen where the money will be invested for any categories not listed.

It's now time to choose your member's investments. Click "Continue" to choose an investment mix for **all** contribution categories.

If you want to instead specify a different investment mix for **each** contribution category, click here.

Continue Cancel

PRIVACY POLICY LEGAL

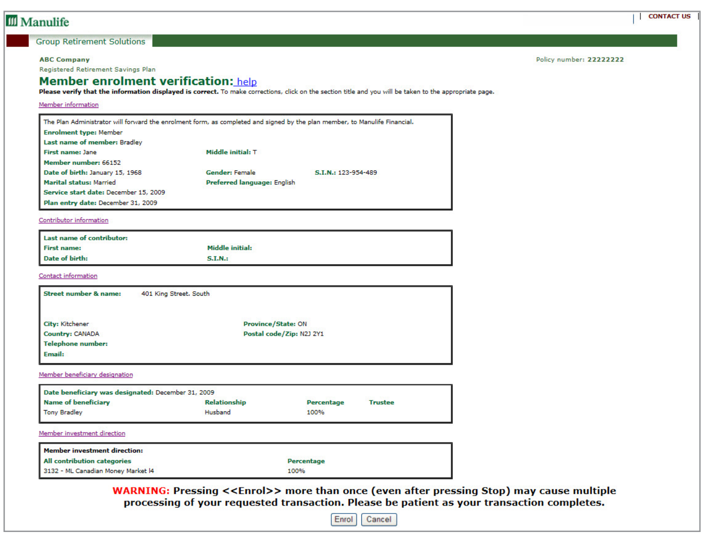
Option 1: Member has not provided investment instructions – contributions will be deposited to the plans default fund. Click No member directions

Option 2: Member has provided investment instructions – click **Continue**. All the investments available within the plan will be listed.

Enter the investment instructions provided by the member. Click **Continue** at the bottom of the page.

STEP 6:

Verify and complete the enrolment.



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Manulife

Group Retirement Solutions

ABC Company
Registered Retirement Savings Plan

Policy number: 22222222

Member enrolment verification: help

Please verify that the information displayed is correct. To make corrections, click on the section title and you will be taken to the appropriate page.

Member information

The Plan Administrator will forward the enrolment form, as completed and signed by the plan member, to Manulife Financial.
Enrolment type: Member
Last name of member: Bradley
First name: Jane **Middle initial:** T
Member number: 66152
Date of birth: January 15, 1968 **Gender:** Female **S.I.N.:** 123-954-489
Marital status: Married **Preferred language:** English
Service start date: December 15, 2009
Plan entry date: December 31, 2009

Contributor information

Last name of contributor:
First name: **Middle initial:**
Date of birth: **S.I.N.:**

Contact information

Street number & name: 401 King Street. South
City: Kitchener **Province/State:** ON
Country: CANADA **Postal code/Zip:** N2J 2Y1
Telephone number:
Email:

Member beneficiary designation

Date beneficiary was designated: December 31, 2009

Name of beneficiary	Relationship	Percentage	Trustee
Tony Bradley	Husband	100%	

Member investment direction

Member investment direction:

All contribution categories	Percentage
3132 - ML Canadian Money Market I4	100%

WARNING: Pressing <<Enrol>> more than once (even after pressing Stop) may cause multiple processing of your requested transaction. Please be patient as your transaction completes.

Enrol Cancel

Once you click **Enrol**, you will receive an on-screen verification. The member is now active on Manulife's administrative system and a contribution can now be submitted for this member.

Manulife

strong reliable trustworthy forward-thinking

CS3705E 03/16