Manulife

You have two options for submitting your members' contributions to Manulife:

- Option 1: Submit a contribution listing (if you only have a few members)
- **Option 2:** Submit a contribution file (if you have many members)

Select the option you prefer and follow the instructions below. All contributions must be remitted via the Plan Sponsor Secure Site.

Option 1: Submit a Contribution listing

Step 1:

Select Manage Your Plan and then select Submit contribution listing from the left hand menu.



Step 2:

Specify the contribution period (i.e. the pay period start and end date that the contributions apply to).

Step 3:

Enter the **contribution amounts**, separating the member and plan sponsor contributions (if applicable), for each member. This page will be pre-populated with the list of all active members in the plan and the last contribution amount for each member. Only update the amounts that have changed in this contribution period.

Registered Retiremen	t Savings Plan			oncy number. EXERCER
submit payment contribution	Welcome to the eli Manulife. The imag Click here to view	actronic contribution submission proces ge on the left will help you keep track o a <u>preparation checklist</u> ,	is. This process allows you to send con f your progress.	tributions and payments to
To submit a contribution	you will be asked for the followin	g information. Please have it ready bef	ore you begin.	
 the period for which the your contribution information the payment information 	is contribution applies mation			
• the period for which the • your contribution information • the payment information You can only submit of the left menu. You will be	his contribution applies mation ion contributions for members alre be able to submit a contribution for	ady enroled in the plan. To enrol a n this member as soon as you complete	nember, click 'Cancel' at the bottom of the online enrolment.	this page and then choose 'Enrol a membe
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Click **Next** to the move to the next screen.

Go to Step 4 at the top of page 3.

Option 2: Submit a Contribution file

Step 1:

Go to **manulife.ca/GRO**, select 'Forms' from the right-hand menu, and then choose 'Find plan sponsor forms' and select the 'Contribution remittance template'.

Without changing the file format or layout, enter the required information for each member.

Save your file - Save the completed file to a preferred location as a .txt file. When you save a file as a text document, it assigns a .txt extension. Be sure you save the file to a location that you can easily access next time.

1	А	В	С	D	E	F	G
1	Plan Name	RRSP					
2	Division						
3	Policy Number	20000472					
4	Total Amount Being Contributed	450.00					
5	Contribution Period Ending Date (YYYYMMMDD)	2015Dec31					
6	Payment by PreAuthorized Debit	450.00					
7	Payment by Wire Transfer						
8	Payment by Cheque						
9	Payment by Variance						
10	Payment by Forfeiture						
11	Member Number	Member Last Name	Member First Name	Member Required	Sponsor Required	Member Voluntary	Sponsor Voluntary
12	729535955	Alain-Lachance	Horane	50	50	50	
13	12345	Jones	Terry	50	50	50	
14	733966592	Tinapay	Stanley Kwok Fai	50	50	50	1
15							

Step 2:

Once you have your contribution file completed, log into the plan sponsor secure website. Select **Manage Your Plan** and then select **Submit contribution file**.

Manulife		CONTACT US	
Group Retirement	Solutions		
660	ABC Company Registered Retirement Savings Plan	Policy number: 22222222	
SELECT A ROLE SEARCH TOOL YOUR PLAN DETAILS	Account values Investment details Plan details Your account value on June 30, 2014	\	MANAGE YOUR PLAN Submit contribution file
PLAN GOVERNANCE SUPPORT CENTRE REPORTING MANAGE YOUR PLAN	Value of your contribution categories	\$ 6,482,352.70	Submit contribution listing
MEMBER TERMINATIONS YOUR INVESTMENTS READY TO RETIRE? NEWS & INFORMATION PIN CHANGE LOGOUT	Employer required 3,517,6 Employee required 2,831,0 Employee voluntary 133,60	04.42 79.89 68.39	<u>Enrol a Member</u> <u>Send a file</u> <u>Review E-Enrolments</u>
	PRIVACY POLICY LEGAL		

Step 3:

Specify the contribution period. Then select the Browse button and find the contribution file you want to upload to Manulife.

Submit a co ABC Company Registered Retirement Savir	pntribution Getting started ngs Plan	Policy number: 2222222
submit payment contribution	Welcome to the electronic contribution submission process. This process allows you to send contributions and payments to Manu you keep track of your progress. Click here to view a <u>proparation checklig</u> .	life. The image on the left will help
To submit a contribution you w	vill be asked for the following information. Please have it ready before you begin.	
 the period for which this cont the name of the file containin the payment information 	tribution applies g your contribution information	
If you are submitting a bon You need to indicate below if y If you are submitting both bon Send your contribution file:	us contribution (e.g. company bonus) ou are submitting a bonus contribution for plan members. A bonus contribution is generally any contribution made over and above the rej us and regular ongoing contributions, you vill need to complete a separate contribution file for each and go through this process twice.	gular ongoing contributions you make for plan members.
Contribution for the period fre Contribution history provides Contribution path and file nam Check here i if this contrib When you click the Continue b	Image: May Image: May 31 2015 Information about previous contributions. mg:* The Browse button opens a dialogue box so you can find and select the file you wish to send to Manulife. ution file is for a bonus contribution (e.g. company bonus) button, Manulife will review a copy of your file, present you a list of errors that require your attention or a payment summary for you to company bonus.	Browse
* Must be completed to procee	Reset Cancel	

Click Continue.

Steps 4 through 6 are the same for both submission options.

Step 4:

Review your contribution summary to ensure the correct amounts are in the appropriate contribution categories. If there are any errors with the file, the contribution file must be adjusted and then re-uploaded.

ABC Company Registered Retirement Savings Plan		Policy number: 22222222
Provide payment information: Help		
submit payment contribution	Thank you. A summary of your contribution and payment due is	s provided here.
Contribution summary for	period ending: June 30, 2014 Amount (\$)	
Contribution summary for Contribution category lember Required	period ending: June 30, 2014 Amount (\$) 745.38	
Contribution summary for Contribution category tember Required ponsor Required	period ending: June 30, 2014 Amount (\$) 745.38 745.38	
Contribution summary for Contribution category Aember Required Sponsor Required dember Voluntary field contribution accented	period ending: June 30, 2014 Amount (\$) 745.38 745.38 0.00 1.490 76	
Contribution summary for Contribution category Aember Required Aember Voluntary otal contribution accepted Payment details:	period ending: June 30, 2014 Amount (\$) 745.38 0.00 1,490.76	
Contribution summary for Contribution category Aember Required Jeamber Voluntary focal contribution accepted Payment details: Select a payment method: Pre-Authorized Debit	Period ending: June 30, 2014 Amount (\$) 745.38 745.38 0.00 1,490.76	

Click the Next button.

Step 5:

Select Pre-Authorized Debit, cheque or wire as payment method from the dropdown list available. For your convenience, you can also pay any billed charges owing (if applicable) with your contribution payment.

Step 6:

Verify the amounts entered and make any corrections, then select Submit.

Submit a contribution		
ABC Company Registered Retirement Savings Plan		Policy number: 22222222
Verify and submit contribution and pay	ment request: Help	
submit payment contribution Payment summary:	You have completed all the steps to prepare this contribution. Simply ver button to complete the contribution submission. To stop the contribution,	ify the information below, then click the <i>Submit</i> click the <i>Cancel</i> button.
	Description	Payment (\$)
Regular contribution payment for the period ending	g: June 30, 2014	745.38
Total amount paid		745.38
Payment method:		
Pre-Authorized Debit - \$745.38		
To complete the contribution, click the Submit but	iton.	
To stop the contribution, click the Cancel button.		
	<pre><< Back Submit Cancel</pre>	



Write down the reference number provided in the confirmation message you receive or print the confirmation page and keep it for your records. If the contribution is submitted online before 4 p.m. ET on a business day with the payment method of Pre-Authorized Debit, the contribution will be processed the same day.



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