


Manulife must be advised if members leave the plan for any of these reasons:

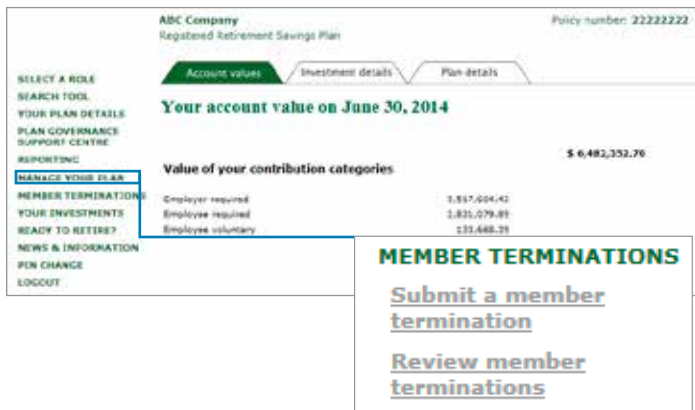
- a) Termination of employment
- b) Retirement
- c) A decision to no longer participate in the plan, if permitted under the rules of the plan
- d) Death

Please note: Termination for a deceased member cannot be performed online. Please refer to the Plan Administrator Guide for detailed instructions.

 **Before you begin:** It is important that Manulife receives the member's final contribution before you submit the termination request so that all savings can be processed at the same time. You will be **unable** to submit contributions for a "terminated" member and will need to contact a Client Account Representative for assistance.

STEP 1:

Select **Member Terminations** and then select **Submit a member termination**.



The screenshot shows the 'ABC Company Registered Retirement Savings Plan' interface. A sidebar on the left contains a menu with 'MEMBER TERMINATIONS' highlighted. A pop-up box displays 'MEMBER TERMINATIONS' with two options: 'Submit a member termination' and 'Review member terminations'. The main content area shows account details for 'June 30, 2014' with a total value of \$6,482,352.70 and a table of contribution categories.

Value of your contribution categories:	
Employer required	3,857,604.42
Employee required	2,835,079.81
Employee voluntary	135,668.21

STEP 3:

Enter the plan member's termination details.

- a) Check the radio button indicating the reason for leaving the plan
- b) Enter the termination date
- c) Select the plan(s) the member is leaving
- d) Enter the period ending date for the final contribution for each plan the member is leaving.



The screenshot shows the 'Specify a reason for termination' screen. The reason 'Termination of employment' is selected. The termination date is set to 06/30/2014. A table below shows the plan details for termination.

Plan(s)	Member number	Last contribution details
<input checked="" type="checkbox"/> ABC	40001	Provide the period ending date: 05/31/14
<input type="checkbox"/> PWR	0000000	

Click **Next** to continue.

STEP 2:

Enter the plan member's name OR member number.



The screenshot shows the 'Select a member' screen. It prompts the user to enter either the member's name or member number. There are input fields for 'Last name' and 'First name', and a field for 'Enter the Member Number'. A 'Select' button is visible at the bottom.

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

STEP 4:

Confirm the plan member's contact information.



The screenshot shows the 'Confirm the member's contact information' screen for Jane Bradley. It displays the member's address, phone number, and email address. There are 'Back', 'Next', and 'Cancel' buttons at the bottom.

Click **Next** to continue.

STEP 5:

Review the termination summary.

ABC Company Registered Retirement Savings Plan Policy number: 22222222
 Termination for: Jane Bradley

Confirm the termination request details

Verify the information you provided is correct. To make a change, select the section title above that item. You will be directed to the appropriate page.

Change the ... Contact information

Member address: 401 King Street, South
 Kitchener, ON
 CANADA N2J 2Y3
 Phone: (513) 747-7000
 Fax:
 Email: sam@manulife.com

Change the ... Termination details

Reason: Termination of employment
 Termination date: January 13, 2011
 Plans the member is leaving:

Policy(s)	Member number	Last contribution details
RRSP, Policy 22222222	66152	January 13, 2011

Click **Confirm** to complete the termination.

ABC Company Registered Retirement Savings Plan Policy number: 22222222

You're done

Termination request details for Jane Bradley [Printer friendly](#) [xscalan](#)

Request date & time: January 13, 2011, 08:46 AM EDT

Member address: 401 King Street, South
 Kitchener, ON
 CANADA N2J 2Y3
 Phone: (513) 747-7000
 Fax:
 Email: sam@manulife.com

Reason: Termination of employment
 Termination date: January 13, 2011
 Plans the member is leaving:

Policy(s)	Member number	Last contribution details	Reference number
RRSP, Policy 22222222	66152	January 13, 2011	8934246

A confirmation screen will be displayed with a reference number.

What happens upon notification of member termination

These default settlement processes are available to specific plan types.

RRSP / TFSA	Automatically transferred to The Manulife Personal Plan. Plan member will receive a letter confirming the new account set up on his/her behalf.
RPP	An Option Statement is issued and assets remain in the plan until the member makes an election.
DPSP	An Option Statement is issued. If the member does not make an election in 90 days and holds an RRSP account with GRS, then assets are transferred to The Manulife Personal Plan. If not, assets are cashed out.
NRSP	An Option Statement is issued. If the member does not make an election in 90 days, assets are transferred to The Manulife Personal Plan.
EPSP	An Option Statement is issued. If the member does not make an election in 90 days, assets are transferred to The Manulife Personal Plan.

Note: For all plan types, if a member has less than \$1,000 in his/her account upon termination, the savings will automatically be cashed out. The member will receive the proceeds minus any fees and withholding tax, if applicable.

