

Financial Change

Use this form to make changes to the following types of policies:

- **Manulife UL YRT Client Investment Select**
- **Manulife UL Level Client Investment Select**
- **Innovision**
- **Performax Gold**
- **UltraVision**
- **Security UL**
- **Limited Pay UL**
- **Future Protection**
- **Secured Protection**
- **UL100**
- **Navi-vision**

See *Universal life investment accounts*, NN0983E, for a complete list of available accounts.

Use *Automatic Transfer Instructions*, NN0947E, if you want to:

- set up or cancel automatic transfers, or
- change the Designated Daily Account on a UL100 policy

Use this form to:

- provide instructions for allocating new or future deposits - page 1
- change your Specified Daily Interest Account (applies to InnoVision, Limited Pay UL and UL100 policies only) - page 1
- provide instructions for allocating new or future additional payments - page 2
- transfer funds between investment accounts within your policy - page 3
- transfer funds between different investment accounts within your Side Account (does not apply to UL100) - page 4
- transfer funds from your Side Account into your policy - page 4

Complete the sections of this form that correspond to the changes you want to make. Sign the bottom of each page you have completed and fax them to us at: 1-877-763-8834 (1-877-271-5494 if you live in Quebec).

1 Policy owner information	Policy owner name (first, middle initial, last or full legal name for corporation)		Policy number																					
2 Allocating your deposits Complete this section if you want to give us instructions for investing a new deposit or future deposits. Select the investment accounts from the list on the <i>Universal life investment accounts</i> , NN0983E, e.g. MA502 = CI Harbour Growth and Income. The effective date for deposits is the business day we receive the funds at our head office.	These instructions apply to (check one or both); this deposit of \$ all future deposits (your instructions will apply to investment accounts in the policy and in the Side Account) Tell us how you want to allocate your deposit. (see <i>Universal life investment accounts</i> , NN0983E)																							
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">Investment account code</th> <th style="width: 40%;">Investment account name</th> <th style="width: 30%;">% of deposit allocated</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td style="text-align: center;">%</td> </tr> <tr> <td> </td> <td> </td> <td style="text-align: center;">%</td> </tr> <tr> <td> </td> <td> </td> <td style="text-align: center;">%</td> </tr> <tr> <td> </td> <td> </td> <td style="text-align: center;">%</td> </tr> <tr> <td> </td> <td> </td> <td style="text-align: center;">%</td> </tr> <tr> <td colspan="2" style="text-align: right;">TOTAL</td> <td style="text-align: center;">100 %</td> </tr> </tbody> </table>		Investment account code	Investment account name	% of deposit allocated			%			%			%			%			%	TOTAL		100 %	
Investment account code	Investment account name	% of deposit allocated																						
		%																						
		%																						
		%																						
		%																						
		%																						
TOTAL		100 %																						
3 Changing your Specified Daily Interest Account Complete this section if you want to change your Specified Daily Interest Account. Refer to the list on the <i>Universal life investment accounts</i> , NN0983E, and choose the investment account you want us to deposit future interest payments to.	If you are allocating deposits to a Simple Interest Guaranteed Investment Account (GIA), we deposit the interest you earn into a separate investment account that you select called your Specified Daily Interest Account. You may not choose a GIA as your Specified Daily Interest Account. Your new Specified Daily Interest Account (see <i>Universal life investment accounts</i> , NN0983E) <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">Investment account code</th> <th style="width: 40%;">Investment account name</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> </tr> </tbody> </table> The Specified Daily Interest Side Account will change to match your new Specified Daily Interest Account.			Investment account code	Investment account name																			
Investment account code	Investment account name																							
4 Sign here By signing here you agree to the changes you've requested above.	Either the policy owner or the insurance advisor must sign. If there are two policy owners, both policy owners or the advisor must sign. If the policy is owned by a corporation, we require the advisor's signature or the company name and either the titles and signatures of two signing officers, or the company seal and the title and signature of one signing officer. If the corporation does not have a corporate seal and you are the only person authorized to sign on behalf of the corporation, sign in the signature box for owner #1 and write your initials in the box provided. <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px;"> Signature of policy owner #1 or signing officer <div style="text-align: center; font-size: 1.5em;">X</div> </td> <td style="width: 50%; padding: 5px;"> Signature of policy owner #2 or signing officer <div style="text-align: center; font-size: 1.5em;">X</div> </td> </tr> <tr> <td style="padding: 5px;"> Initial here <div style="border: 1px solid black; height: 30px; width: 100%;"></div> </td> <td></td> </tr> <tr> <td colspan="2" style="text-align: center; padding: 5px;"> or </td> </tr> <tr> <td style="padding: 5px;"> Signature of advisor <div style="text-align: center; font-size: 1.5em;">X</div> </td> <td style="padding: 5px;"> Advisor code </td> <td style="padding: 5px;"> Date and time of client contact <input type="radio"/> a.m. <input type="radio"/> p.m. </td> </tr> </table>			Signature of policy owner #1 or signing officer <div style="text-align: center; font-size: 1.5em;">X</div>	Signature of policy owner #2 or signing officer <div style="text-align: center; font-size: 1.5em;">X</div>	Initial here <div style="border: 1px solid black; height: 30px; width: 100%;"></div>		or		Signature of advisor <div style="text-align: center; font-size: 1.5em;">X</div>	Advisor code	Date and time of client contact <input type="radio"/> a.m. <input type="radio"/> p.m.												
Signature of policy owner #1 or signing officer <div style="text-align: center; font-size: 1.5em;">X</div>	Signature of policy owner #2 or signing officer <div style="text-align: center; font-size: 1.5em;">X</div>																							
Initial here <div style="border: 1px solid black; height: 30px; width: 100%;"></div>																								
or																								
Signature of advisor <div style="text-align: center; font-size: 1.5em;">X</div>	Advisor code	Date and time of client contact <input type="radio"/> a.m. <input type="radio"/> p.m.																						

Financial Change – Performax Gold policies

Complete the sections on this page to change your allocation instructions for additional payments to your Performax Gold policy. Sign the bottom of each page you have completed and fax them to us at:
1-877-763-8834 (1-877-271-5494 if you live in Quebec).

5 Policy owner information	Policy owner name (first, middle initial, last or full legal name for corporation)	Policy number
-----------------------------------	--	---------------

6 Allocating your additional payments Complete this section if you want to give us instructions for applying a new additional payment or future additional payments. The effective date for additional payments is the business day we receive the funds at our head office.	<p>These instructions apply to (check one or both); this additional payment of \$ all future additional payments</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 80%;">Tell us how you want to allocate your additional payment.</th><th style="width: 20%;">% of additional payment allocated</th></tr> </thead> <tbody> <tr> <td>To deposit option insurance coverage number</td><td style="text-align: center;">%</td></tr> <tr> <td>To deposit option insurance coverage number</td><td style="text-align: center;">%</td></tr> <tr> <td>To deposit option insurance coverage number</td><td style="text-align: center;">%</td></tr> <tr> <td>To deposit option insurance coverage number</td><td style="text-align: center;">%</td></tr> <tr> <td>To deposit option insurance coverage number</td><td style="text-align: center;">%</td></tr> <tr> <td>To deposit option insurance coverage number</td><td style="text-align: center;">%</td></tr> <tr> <td>To accumulation account</td><td style="text-align: center;">%</td></tr> <tr> <td style="text-align: right;">TOTAL</td><td style="text-align: center;">100 %</td></tr> </tbody> </table>	Tell us how you want to allocate your additional payment.	% of additional payment allocated	To deposit option insurance coverage number	%	To deposit option insurance coverage number	%	To deposit option insurance coverage number	%	To deposit option insurance coverage number	%	To deposit option insurance coverage number	%	To deposit option insurance coverage number	%	To accumulation account	%	TOTAL	100 %
Tell us how you want to allocate your additional payment.	% of additional payment allocated																		
To deposit option insurance coverage number	%																		
To deposit option insurance coverage number	%																		
To deposit option insurance coverage number	%																		
To deposit option insurance coverage number	%																		
To deposit option insurance coverage number	%																		
To deposit option insurance coverage number	%																		
To accumulation account	%																		
TOTAL	100 %																		

7 Sign here By signing here you agree to the changes you've requested above.	<p>Either the policy owner or the insurance advisor must sign. If there are two policy owners, both policy owners or the advisor must sign. If the policy is owned by a corporation, we require the advisor's signature or the company name and either the titles and signatures of two signing officers, or the company seal and the title and signature of one signing officer. If the corporation does not have a corporate seal and you are the only person authorized to sign on behalf of the corporation, sign in the signature box for owner #1 and write your initials in the box provided.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Signature of policy owner #1 or signing officer X</td><td style="width: 50%;">Signature of policy owner #2 or signing officer X</td></tr> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Initial here</td><td>Write your initials here to confirm that you are the only person authorized to sign on behalf of the corporation and that it does not have a seal. You must also sign above.</td></tr> </table> <p>or</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 40%;">Signature of advisor X</td><td style="width: 20%;">Advisor code</td><td style="width: 40%;">Date and time of client contact <input type="radio"/> a.m. <input type="radio"/> p.m. </td></tr> </table>	Signature of policy owner #1 or signing officer X	Signature of policy owner #2 or signing officer X	Initial here	Write your initials here to confirm that you are the only person authorized to sign on behalf of the corporation and that it does not have a seal. You must also sign above.	Signature of advisor X	Advisor code	Date and time of client contact <input type="radio"/> a.m. <input type="radio"/> p.m.
Signature of policy owner #1 or signing officer X	Signature of policy owner #2 or signing officer X							
Initial here	Write your initials here to confirm that you are the only person authorized to sign on behalf of the corporation and that it does not have a seal. You must also sign above.							
Signature of advisor X	Advisor code	Date and time of client contact <input type="radio"/> a.m. <input type="radio"/> p.m.						

Financial Change

Complete the sections of this form that correspond to the changes you want to make. Sign the bottom of each page you have completed and fax them to us at: 1-877-763-8834 (1-877-271-5494 if you live in Quebec).

All requests for fund transfers that we receive BY 4 p.m. EST will be processed effective the next business day, using the unit value of the previous day's close. Transfer requests received AFTER 4 p.m. EST will be effective the second business day, which means the value will be the value as of 4 p.m. EST the next day.

8 Policy owner information	Policy owner name (first, middle initial, last)		Policy number	
-----------------------------------	---	--	---------------	--

9 Transferring funds between the policy's investment accounts <p>Some investment accounts have minimum deposit amounts - see the list on the <i>Universal life investment accounts</i>, NN0983E.</p> <p>If you want to make more transfers, complete an additional form.</p> <p>Remember, when you are making transfers between investment accounts, you may also need to adjust the investment accounts within your Side Account. If so, select one of the following.</p> <p>You want to transfer the funds in your Side Account according to the transfer instructions you have given us on this page.</p> <p>You want to transfer the funds in your Side Account as shown on page 4.</p> <p>The transfer instructions you give us on this form will not replace any automatic transfer instructions you have in place on your policy. This will be a one-time request in addition to your automatic transfer.</p>	<div style="border: 1px solid black; padding: 5px;"> Transfer #1 <div style="display: flex; justify-content: space-between;"> <div>FROM:</div> <div>TO:</div> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Investment account code</th> <th>Investment account name</th> <th>Amount</th> <th>Investment account code</th> <th>Investment account name</th> <th>Amount</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table> </div> <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> Transfer #2 <div style="display: flex; justify-content: space-between;"> <div>FROM:</div> <div>TO:</div> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Investment account code</th> <th>Investment account name</th> <th>Amount</th> <th>Investment account code</th> <th>Investment account name</th> <th>Amount</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table> </div> <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> Transfer #3 (For GIAs only) <div style="display: flex; justify-content: space-between;"> <div>FROM: Simple Interest GIAs</div> <div>TO:</div> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Investment account code</th> <th>Investment account name</th> <th>Deposit date (dd/mm/yyyy)</th> <th>Make transfer</th> <th>Amount</th> <th>Investment account code</th> <th>Investment account name</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td><input type="radio"/> now, or <input type="radio"/> at maturity</td> <td> </td> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> <td><input type="radio"/> now, or <input type="radio"/> at maturity</td> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> </div> <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> <div style="display: flex; justify-content: space-between;"> <div>FROM: Compound Interest GIAs</div> <div>TO:</div> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Investment account code</th> <th>Investment account name</th> <th>Deposit date (dd/mm/yyyy)</th> <th>Make transfer</th> <th>Amount</th> <th>Investment account code</th> <th>Investment account name</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td><input type="radio"/> now, or <input type="radio"/> at maturity</td> <td> </td> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> <td><input type="radio"/> now, or <input type="radio"/> at maturity</td> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> </div>					Investment account code	Investment account name	Amount	Investment account code	Investment account name	Amount																									Investment account code	Investment account name	Amount	Investment account code	Investment account name	Amount																									Investment account code	Investment account name	Deposit date (dd/mm/yyyy)	Make transfer	Amount	Investment account code	Investment account name	Amount				<input type="radio"/> now, or <input type="radio"/> at maturity								<input type="radio"/> now, or <input type="radio"/> at maturity					Investment account code	Investment account name	Deposit date (dd/mm/yyyy)	Make transfer	Amount	Investment account code	Investment account name	Amount				<input type="radio"/> now, or <input type="radio"/> at maturity								<input type="radio"/> now, or <input type="radio"/> at maturity				
Investment account code	Investment account name	Amount	Investment account code	Investment account name	Amount																																																																																																												
Investment account code	Investment account name	Amount	Investment account code	Investment account name	Amount																																																																																																												
Investment account code	Investment account name	Deposit date (dd/mm/yyyy)	Make transfer	Amount	Investment account code	Investment account name	Amount																																																																																																										
			<input type="radio"/> now, or <input type="radio"/> at maturity																																																																																																														
			<input type="radio"/> now, or <input type="radio"/> at maturity																																																																																																														
Investment account code	Investment account name	Deposit date (dd/mm/yyyy)	Make transfer	Amount	Investment account code	Investment account name	Amount																																																																																																										
			<input type="radio"/> now, or <input type="radio"/> at maturity																																																																																																														
			<input type="radio"/> now, or <input type="radio"/> at maturity																																																																																																														

Interest account (if not Savings)	If you are transferring money into a Simple Interest GIA and if you have not already selected an investment account to receive interest, please select one now. (Default is Savings Account.)	
--	---	--

10 Sign here	<p>Either the policy owner or the insurance advisor must sign. If there are two policy owners, both policy owners or the advisor must sign. If the policy is owned by a corporation, we require the advisor's signature or the company name and either the titles and signatures of two signing officers, or the company seal and the title and signature of one signing officer. If the corporation does not have a corporate seal and you are the only person authorized to sign on behalf of the corporation, sign in the signature box for owner #1 and write your initials in the box provided.</p>		
	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> Signature of policy owner #1 or signing officer <div style="border: 1px solid black; height: 30px; width: 100%; margin-top: 5px;">X</div> </div> <div style="width: 45%;"> Signature of policy owner #2 or signing officer <div style="border: 1px solid black; height: 30px; width: 100%; margin-top: 5px;">X</div> </div> </div>		
	Initial here	Write your initials here to confirm that you are the only person authorized to sign on behalf of the corporation and that it does not have a seal. You must also sign above.	
	or <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> Signature of advisor <div style="border: 1px solid black; height: 30px; width: 100%; margin-top: 5px;">X</div> </div> <div style="width: 20%;">Advisor code</div> <div style="width: 35%;">Date and time of client contact <input type="radio"/> a.m. <input type="radio"/> p.m.</div> </div>		

Financial Change

Complete the sections of this form that correspond to the changes you want to make. Sign the bottom of each page you have completed and fax them to us at: 1-877-763-8834 (1-877-271-5494 if you live in Quebec).

All requests for fund transfers that we receive BY 4 p.m. EST will be processed effective the next business day, using the unit value of the previous day's close. Transfer requests received AFTER 4 p.m. EST will be effective the second business day, which means the value will be the value as of 4 p.m. EST the next day.

11 Policy owner information	Policy owner name (first, middle initial, last)	Policy number
------------------------------------	---	---------------

12 Transferring funds between investment accounts within your Side Account This does not apply to UL100, which has only one investment account (a Savings Account) in the Side Account. If you want to make more transfers, complete an additional form.	<table style="width: 100%;"> <tr> <td colspan="3">Transfer #1</td><td colspan="3">TO:</td></tr> <tr> <td>FROM:</td><td></td><td></td><td></td><td></td><td></td></tr> <tr> <td>Investment account code</td><td>Investment account name</td><td>Amount</td><td>Investment account code</td><td>Investment account name</td><td>Amount</td></tr> <tr> <td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr> <td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> </table> <table style="width: 100%;"> <tr> <td colspan="3">Transfer #2 (For InnoVision and Limited Pay ULGIAs)</td><td colspan="3">TO:</td></tr> <tr> <td colspan="3">FROM: Simple Interest GIAs</td><td colspan="3"></td></tr> <tr> <td>Investment account code</td><td>Investment account name</td><td>Deposit date (dd/mm/yyyy)</td><td>Make transfer</td><td>Amount</td><td>Investment account code</td><td>Investment account name</td><td>Amount</td></tr> <tr> <td> </td><td> </td><td> </td><td><input type="radio"/> now, or <input type="radio"/> at maturity</td><td> </td><td> </td><td> </td><td> </td></tr> <tr> <td> </td><td> </td><td> </td><td><input type="radio"/> now, or <input type="radio"/> at maturity</td><td> </td><td> </td><td> </td><td> </td></tr> </table> <table style="width: 100%;"> <tr> <td colspan="3">FROM: Compound Interest GIAs</td><td colspan="3">TO:</td></tr> <tr> <td>Investment account code</td><td>Investment account name</td><td>Deposit date (dd/mm/yyyy)</td><td>Make transfer</td><td>Amount</td><td>Investment account code</td><td>Investment account name</td><td>Amount</td></tr> <tr> <td> </td><td> </td><td> </td><td><input type="radio"/> now, or <input type="radio"/> at maturity</td><td> </td><td> </td><td> </td><td> </td></tr> <tr> <td> </td><td> </td><td> </td><td><input type="radio"/> now, or <input type="radio"/> at maturity</td><td> </td><td> </td><td> </td><td> </td></tr> </table>	Transfer #1			TO:			FROM:						Investment account code	Investment account name	Amount	Investment account code	Investment account name	Amount													Transfer #2 (For InnoVision and Limited Pay ULGIAs)			TO:			FROM: Simple Interest GIAs						Investment account code	Investment account name	Deposit date (dd/mm/yyyy)	Make transfer	Amount	Investment account code	Investment account name	Amount				<input type="radio"/> now, or <input type="radio"/> at maturity								<input type="radio"/> now, or <input type="radio"/> at maturity					FROM: Compound Interest GIAs			TO:			Investment account code	Investment account name	Deposit date (dd/mm/yyyy)	Make transfer	Amount	Investment account code	Investment account name	Amount				<input type="radio"/> now, or <input type="radio"/> at maturity								<input type="radio"/> now, or <input type="radio"/> at maturity				
Transfer #1			TO:																																																																																														
FROM:																																																																																																	
Investment account code	Investment account name	Amount	Investment account code	Investment account name	Amount																																																																																												
Transfer #2 (For InnoVision and Limited Pay ULGIAs)			TO:																																																																																														
FROM: Simple Interest GIAs																																																																																																	
Investment account code	Investment account name	Deposit date (dd/mm/yyyy)	Make transfer	Amount	Investment account code	Investment account name	Amount																																																																																										
			<input type="radio"/> now, or <input type="radio"/> at maturity																																																																																														
			<input type="radio"/> now, or <input type="radio"/> at maturity																																																																																														
FROM: Compound Interest GIAs			TO:																																																																																														
Investment account code	Investment account name	Deposit date (dd/mm/yyyy)	Make transfer	Amount	Investment account code	Investment account name	Amount																																																																																										
			<input type="radio"/> now, or <input type="radio"/> at maturity																																																																																														
			<input type="radio"/> now, or <input type="radio"/> at maturity																																																																																														

Interest account (if not Savings)	If you are transferring money into a Simple Interest GIA and if you have not already selected an investment account to receive interest, please select one now. (Default is Savings Account.)
--	---

13 Transferring funds from investments accounts within your Side Account to the matching investment accounts within your policy Funds held in investment accounts within the Side Account may only be transferred to the matching investment accounts within the policy. There are also limits on the amount you may transfer. Write 'maximum amount' in the amount column if you want to transfer the maximum amount possible for your policy.	<table style="width: 100%;"> <tr> <td colspan="3">FROM:</td></tr> <tr> <td>Investment account code</td><td>Investment account name</td><td>Amount (maximum amount or \$)</td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> </table> <p>If you are making transfers from more than one investment account within your Side Account, we will make the transfers in the order you have listed the investment accounts above, until the limit for your policy is reached. When you write 'maximum amount', we will transfer funds from that account until it is exhausted before transferring funds from the next investment account listed.</p>	FROM:			Investment account code	Investment account name	Amount (maximum amount or \$)															
FROM:																						
Investment account code	Investment account name	Amount (maximum amount or \$)																				

14 Sign here By signing here you agree to the changes you've requested above.	<p>Either the policy owner or the insurance advisor must sign. If there are two policy owners, both policy owners or the advisor must sign. If the policy is owned by a corporation, we require the advisor's signature or the company name and either the titles and signatures of two signing officers, or the company seal and the title and signature of one signing officer. If the corporation does not have a corporate seal and you are the only person authorized to sign on behalf of the corporation, sign in the signature box for owner #1 and write your initials in the box provided.</p> <table style="width: 100%;"> <tr> <td style="width: 50%;"> Signature of policy owner #1 or signing officer <div style="text-align: center; font-size: 2em; font-weight: bold;">X</div> </td><td style="width: 50%;"> Signature of policy owner #2 or signing officer <div style="text-align: center; font-size: 2em; font-weight: bold;">X</div> </td></tr> </table> <table style="width: 100%;"> <tr> <td style="width: 20%;">Initial here</td><td>Write your initials here to confirm that you are the only person authorized to sign on behalf of the corporation and that it does not have a seal. You must also sign above.</td></tr> </table> <p>or</p> <table style="width: 100%;"> <tr> <td style="width: 40%;">Signature of advisor <div style="text-align: center; font-size: 2em; font-weight: bold;">X</div></td><td style="width: 20%;">Advisor code</td><td style="width: 40%;">Date and time of client contact <div style="text-align: right;"><input type="radio"/> a.m. <input type="radio"/> p.m.</div></td></tr> </table>	Signature of policy owner #1 or signing officer <div style="text-align: center; font-size: 2em; font-weight: bold;">X</div>	Signature of policy owner #2 or signing officer <div style="text-align: center; font-size: 2em; font-weight: bold;">X</div>	Initial here	Write your initials here to confirm that you are the only person authorized to sign on behalf of the corporation and that it does not have a seal. You must also sign above.	Signature of advisor <div style="text-align: center; font-size: 2em; font-weight: bold;">X</div>	Advisor code	Date and time of client contact <div style="text-align: right;"><input type="radio"/> a.m. <input type="radio"/> p.m.</div>
Signature of policy owner #1 or signing officer <div style="text-align: center; font-size: 2em; font-weight: bold;">X</div>	Signature of policy owner #2 or signing officer <div style="text-align: center; font-size: 2em; font-weight: bold;">X</div>							
Initial here	Write your initials here to confirm that you are the only person authorized to sign on behalf of the corporation and that it does not have a seal. You must also sign above.							
Signature of advisor <div style="text-align: center; font-size: 2em; font-weight: bold;">X</div>	Advisor code	Date and time of client contact <div style="text-align: right;"><input type="radio"/> a.m. <input type="radio"/> p.m.</div>						

The tables below list the investment accounts available to the following policies:

- **Manulife UL YRT Client Investment Select**
- **Manulife UL Level Client Investment Select**
- **InnoVision**
- **UltraVision**

- **Security UL**
- **Limited Pay UL**
- **UL100**

- **Future Protection**
- **Secured Protection**
- **Navi-vision**

Use both the investment account code and investment account name when completing forms.

Example:

Investment account code	Investment account name
MA502	CI Harbour Growth and Income

Simple Interest and Compound Interest GIAs (cannot be used as Specified Daily Interest Accounts)

- ▲ = Available - minimum investment is \$250
- = Available - minimum investment is \$500
- = Available - minimum investment is \$1,000
- = Available - minimum investment is \$5,000
- ✓ = market value adjustments may apply

Investment account code	Investment account name	Manulife UL	InnoVision	UltraVision	Security UL	Limited Pay UL	UL100	Future Protection and Secured Protection	Navi-vision
-------------------------	-------------------------	-------------	------------	-------------	-------------	----------------	-------	--	-------------

Simple Interest GIAs

GIA - S1	1 year simple ✓	N/A	○	N/A	N/A	○	●	N/A	N/A
GIA - S2	2 year simple ✓	N/A	N/A	N/A	N/A	N/A	●	N/A	N/A
GIA - S3	3 year simple ✓	N/A	○	N/A	N/A	○	●	N/A	N/A
GIA - S4	4 year simple ✓	N/A	N/A	N/A	N/A	N/A	●	N/A	N/A
GIA - S5	5 year simple ✓	N/A	○	N/A	N/A	○	●	N/A	N/A
GIA - S10	10 year simple ✓	N/A	○	N/A	N/A	N/A	●	N/A	N/A
GIA - S20	20 year simple ✓	N/A	○	N/A	N/A	N/A	●	N/A	N/A

Compound Interest GIAs

GIA - C1	1 year compound ✓	○	N/A	■	N/A	N/A	N/A	N/A	N/A
GIA - C3	3 year compound ✓	○	■	■	N/A	■	■	○	▲
GIA - C5	5 year compound ✓	○	■	■	N/A	■	■	○	▲
GIA - C10	10 year compound ✓	○	■	■	N/A	N/A	■	○	▲
GIA - C1 to GIA - C10	Select from 1 to 10 year terms ✓	N/A	N/A	N/A	N/A	N/A	N/A	N/A	▲
GIA - C20	20 year compound ✓	○	N/A	■	N/A	N/A	N/A	N/A	N/A

Daily Interest Accounts (can be used as Specified Daily Interest Accounts)

- = Available - no minimum investment amount
- * = In the side account, the indexed, balanced index and managed holding side accounts earn the same interest rate as the saving side account.
- ✓ = market value adjustments may apply

Investment account code	Investment account name	Manulife UL	InnoVision	UltraVision	Security UL	Limited Pay UL	UL100	Future Protection and Secured Protection	Navi-vision
SVG	Savings	□	□	□	□	□	□	N/A	□
CIA	Current interest	N/A	N/A	N/A	N/A	N/A	N/A	□	N/A
AVGIA	Average GIA ✓	N/A	N/A	□	□	□	□	□	N/A
MTPA	Mid-term Portfolio Average ✓	N/A	□	N/A	N/A	N/A	N/A	N/A	N/A
LTPA	Long-term Portfolio Average ✓	N/A	□	N/A	N/A	N/A	N/A	N/A	N/A
CBALI	Conservative Balanced Index*	□	□	□	□	N/A	□	□	□
MBALI	Moderate Balanced Index*	□	□	□	□	N/A	□	□	□

Daily Interest Accounts (can be used as Specified Daily Interest Accounts) (continued)

☐ = Available - no minimum investment amount

* = In the side account, the indexed, balanced index and managed holding side accounts earn the same interest rate as the saving side account.

✓ = market value adjustments may apply

Investment account code	Investment account name	Manulife UL	InnoVision	UltraVision	Security UL	Limited Pay UL	UL100	Future Protection and Secured Protection	Navi-vision
GBALI	Growth Balanced Index*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CDNEI	Canadian Equity Index*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A	<input type="checkbox"/>	<input type="checkbox"/>
SMA	Stock market	N/A	N/A	N/A	N/A	N/A	<input type="checkbox"/>	N/A	N/A
CDNBI	Canadian Bond Index*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A	N/A	<input type="checkbox"/>
AMEI	American Equity Index*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AMTEI	American Technology Equity Index*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A	N/A	<input type="checkbox"/>
EUROEI	European Equity Index*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A	N/A	<input type="checkbox"/>
JAPEI	Japanese Equity Index*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A	N/A	<input type="checkbox"/>
G5	G5 Index*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GLEI	Global Equity Index*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	<input type="checkbox"/>	N/A	<input type="checkbox"/>

Managed Accounts

☐ = Available - no minimum investment amount

* = In the side account, the indexed, balanced index and managed holding side accounts earn the same interest rate as the saving side account.

Note: Available products for managed accounts are listed beside the account name. If your product is not listed, these accounts are unavailable.

Investment account code	Investment account name	Manulife UL	InnoVision	UltraVision	Limited Pay UL	UL100
MA452	Invesco Canadian Premier Growth Class*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA453	Invesco Canadian Balanced*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA475	CI Cambridge American Equity*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA501	CI Harbour*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA502	CI Harbour Growth and Income*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA504	CI Signature Income & Growth*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA510	Dynamic Value Balanced*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA511	Dynamic Value Fund of Canada*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA512	Dynamic Power Canadian Growth*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA521	Manulife Emerging Markets*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA524	Manulife Yield Opportunities*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA526	Manulife Growth Opportunities*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA530	Manulife Monthly High Income*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA532	Manulife Corporate Bond*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA534	Manulife Fundamental Equity*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA535	Manulife Canadian Investment Class*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>
MA536	Manulife Diversified Investment*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA537	Manulife Global Small Cap*	N/A	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA538	Manulife U.S. Equity*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA539	Manulife World Investment Class*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>
MA540	Manulife Strategic Income*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA541	Manulife Strategic Balanced Yield*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A

Managed Accounts (continued)

☐ = Available - no minimum investment amount

* = In the side account, the indexed, balanced index and managed holding side accounts earn the same interest rate as the savings side account.

Investment account code	Investment account name	Manulife UL	InnoVision	UltraVision	Limited Pay UL	UL100
MA543	Manulife Dividend Income*	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A
MA544	Manulife U.S. All Cap Equity*	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A
MA545	Manulife Global Equity Class*	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A
MA546	Manulife U.S. Monthly High Income*	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A
MA547	Manulife Global Balanced*	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A
MA548	Manulife Strategic Investment Grade Global Bond*	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A
MA550	Fidelity Canadian Large Cap*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA551	Fidelity Europe*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA552	Fidelity U.S. Focused Stock*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>
MA553	Fidelity Global*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA554	Fidelity True North*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA555	Fidelity Canadian Bond*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA556	Fidelity Monthly Income*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA557	Fidelity Emerging Markets*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA560	Mackenzie Cundill Value*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA561	Mackenzie Ivy Foreign Equity*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>
MA562	Mackenzie Canadian Large Cap Dividend & Growth*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>
MA564	Mackenzie U.S. Large Cap Growth*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA565	Mackenzie Canadian Resource*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA566	Mackenzie Canadian Growth*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA570	TD Dividend Income*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA600	Invesco Select Canadian Equity*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA601	Trimark Global Fundamental Equity*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A
MA806	Manulife Conservative Portfolio*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MA807	Manulife Moderate Portfolio*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MA808	Manulife Balanced Portfolio*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MA809	Manulife Growth Portfolio*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>