



Please print clearly in the blank boxes.

## Application Form

### Sign up for your Tax-Free Savings Account (TFSA)

Send your completed form to:

**Manulife Financial**

Attn: GRS Client Services, KC-6, P.O. Box 396 Stn  
Waterloo, Waterloo, ON N2J 4A9, CANADA

*If you aren't sure how to complete any of these boxes, the Plan Sponsor/Employer can help you.*

### Tell us about your plan

Plan Sponsor/Employer <b>International Brotherhood of Electrical Workers</b>		Manulife policy number <b>41004006</b>
Member Number	Date you started with your employer (mmm/dd/yyyy)	Date you are joining the plan (mmm/dd/yyyy)

*For your Account to qualify as a TFSA under the Income Tax Act (Canada), you must be at least 18 years of age and a resident in Canada.*

### Your personal information

Gender	First Name	Middle Initial	Last Name
Mailing address (number, street and apartment number)			
City	Province	Country	Postal Code
Date of birth (mmm/dd/yyyy)	Social Insurance Number (SIN)		Marital Status
Your preferred language	Telephone number	Ext.	Email address

A **revocable** Successor Account Holder or Beneficiary can be changed at anytime.

An **irrevocable** Beneficiary can only be changed with written consent from that Beneficiary. You will also need your Beneficiary's consent to withdraw or transfer money from your Account. A parent or guardian cannot provide consent on behalf of a minor who has been named as irrevocable Beneficiary.

If you want to name more than three beneficiaries, attach a dated and signed separate page with the names and the percentage of proceeds for each Beneficiary.

If you die while your Beneficiary is still a minor, the trustee you name on this form will act on the child's behalf.

## Your beneficiary (or beneficiaries)

If you have designated one Beneficiary, and that Beneficiary is your Spouse or Common-Law Partner at the time of your death, your Spouse or Common-Law Partner will become the Successor Account Holder under the Plan and the TFSA will continue unless elected otherwise.

Beneficiary Name(s)	Relationship	Percentage of proceeds
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The above Beneficiary designation is considered revocable unless you write irrevocable in the above designation.

If you do not name a Beneficiary, proceeds will be paid to your estate.

I have attached a separate page, signed and dated listing my beneficiaries.

### For Quebec only:

The designation of a Spouse as a Beneficiary is deemed to be irrevocable unless specified here:  Revocable

### Trustee for a minor beneficiary named above (not applicable in Quebec)

Any payment to a beneficiary who is a minor will be paid in trust to the trustee named below.

In **Quebec**, the proceeds will be paid in trust to the minor child's tutor.

Trustee name	Relationship
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If you do not complete this section, or the total does not add up to 100%, your contributions will be invested in the appropriate Target Retirement Date Fund based on when you reach your plan's normal retirement age.

You can go online to change the funds you have chosen.

The minimum amount you can invest in a fund is 5%.

Percentages must be whole numbers.

Note: the investment performance of a market-based fund is not guaranteed.

## Your investment instructions

Follow the instructions on page 14 to see what type of investor you are. Then fill in **one** of the sections below according to your type.

### Complete if Retirement Date Fund is your investment strategy

- Follow the instructions starting on page 13 to choose your Retirement Date Fund.
- Write in the 4-digit fund code for your Retirement Date Fund below.

Fund Code	Fund name <b>Target Retirement Date Fund</b>	Percentage of your contribution <b>100%</b>
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### Complete if Asset Allocation Fund is your investment strategy

- Follow the instructions starting on page 14 to determine your investor style and choose your Asset Allocation Fund.
- Write in the 4-digit fund code for your Asset Allocation Fund below.

Fund Code	Fund name <b>Manulife Asset Allocation Fund</b>	Percentage of your contribution <b>100%</b>
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### Complete if Build your own portfolio is your investment strategy

- Follow the instructions starting on page 14 to determine your investor style and choose your funds.
- Specify the percentage of contributions you want to invest in each fund. Your percentages must add to 100%.

Fund Code	%	Fund Code	%	Fund Code	%	Fund Code	%
1000		1001		1002		1003	
1004		1005		1010		3132	
4131		4136		4162		4191	
4192		4271		5011		5132	
5181		5452		7132		7141	
7241		7313		7451		7631	
7381		8196		8631		8011	
8321		8361		8452		8181	

Total selected must add up to 100% **100%**

**Please sign here**

I confirm that I have read, understood and agreed to the information in the policy and this Application Form, including the *Enrolment and Registration Authorization* section below, and the *Personal Information Statement*. I also confirm that information in this Application Form is correct to the best of my knowledge.

**Enrolment and Registration Authorization**

I request that Manulife enrol me as a Member in this Plan and file an election with the Minister of National Revenue to register the qualifying arrangement as a Tax-Free Savings Account (TFSA). I agree to provide, upon request, proof of age and such further information as may be required in connection with the registration of the qualifying arrangement under the Income Tax Act (Canada).

I authorize my Plan Sponsor/Employer to act as agent for the purpose of remitting contributions and to deliver directions to Manulife on my behalf.

I shall notify Manulife if I become a non-resident of Canada and further recognize there are restrictions and penalties that may apply in accordance with the Income Tax Act (Canada).

I understand that I may be liable for certain tax consequences arising in connection with a non-qualifying arrangement.

Your signature (as the Account Holder)	Date signed (mmm/dd/yyyy)
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**Brett Marchand**  
SVP & Head of Canada Retirement

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**For Manulife use**

Manulife customer number	Date (mmm/dd/yyyy)	Document version <b>815-1.5</b>
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