

Access client statements through BankLink

Viewing your clients' investment products with Manulife Bank allows you to provide better service to your clients. For example, you can:

- Obtain yearly loan interest information to assist in completing a clients' income tax return
- View contributions into Registered Advantage Accounts and TFSAs
- Identify your clients' statement and email notification preferences at any time

Note: Client statements are based on client information as of the date the statement was created.

Follow the steps below to locate your clients' account and view a statement for their Registered Advantage Account, TFSA, GIC, or loan products through *BankLink*.

Step 1: Log into *BankLink* and from *My options*, select **View client accounts**.

The screenshot shows the BankLink interface. At the top, there is a green header with the Manulife Bank logo, 'Logged In:', and navigation links for 'FRANÇAIS | FEEDBACK | HELP | CLOSE' and the 'BankLink' logo. Below the header is a 'Home' button. The main content area is titled 'Welcome to Manulife Bank' and features a 'My options' sidebar on the left. The 'View client accounts' option in this sidebar is highlighted with a red box. The main area displays 'My recent applications (Last 6 months)' with three sections: 'Applications not yet submitted (13)', 'Applications submitted (9)', and 'Applications completed'. Each section contains a table of application details.

Applications not yet submitted (13)				
MISTYTHREE, KNEES	Investment Loan	\$150,000.00	Not submitted	
Tomson, Barry	Investment Loan	\$120,000.00	Not submitted	
[Redacted]	Registered Savings Plan	\$35,000.00	Not submitted	

Applications submitted (9)				
Please send signed documents				
Tomson, Barry	Investment Loan	\$120,000.00	Under review	
Hennessy, Michelle	Personal Advantage Account	\$1.00	Under review	
[Redacted]	Registered Savings Plan	\$10,000.00	Under review	

Applications completed				
Tomson, Barry	RRSP Loan	\$21,000.00	Welcome letter issued	

Step 2: Enter your *client details* and select **Search**.

The screenshot shows the BankLink search interface. It features a green header with the Manulife Bank logo, 'Logged In:', and navigation links for 'FRANÇAIS | FEEDBACK | HELP | CLOSE' and the 'BankLink' logo. Below the header is a 'Home' button. The main content area is titled 'Search' and 'Details'. Under 'Search by Client', there are input fields for 'Last/Business name' (containing 'Test'), 'First name', and 'SIN/BN', along with checkboxes for 'starts with'. Under 'Search by Account', there are input fields for 'Number' and 'Type'. At the bottom, there are 'Search' and 'Clear' buttons, with the 'Search' button highlighted by a red box.

Step 3: Choose the product you wish to view a statement on by clicking on the account number.

Manulife Bank FRANÇAIS | FEEDBACK | HELP | CLOSE BankLink

Logged In: Home

Search **Details**

Balances for Thursday Testday as at November 17, 2022 08:49 AM Printer friendly version

Loans

	Statements	Notifications	Status	Available Borrowing Limit	Current Borrowings
RRSP Loan 1713489	Paper	No	Active		\$10,000.00

Please note that some transactions may not be reflected in the balances shown. The information contained in this statement is strictly for information purposes in order to properly service the banking products and services purchased by clients and is not intended to provide legal, tax, accounting, insurance or investment advice. Variable rates are subject to change. All funds are in Canadian dollars unless otherwise indicated. The balance shown for the borrowings is the principal balance only. The actual payout amount may differ.

Step 4: Select the statements link to view the statement in PDF format.

Loans Printer friendly version

	Statements	Notifications	Status	Available Borrowing Limit	Current Borrowings
RRSP Loan 1713489	Paper	No	Active		\$10,000.00

Please note that some transactions may not be reflected in the balances shown. The information contained in this statement is strictly for information purposes in order to properly service the banking products and services purchased by clients and is not intended to provide legal, tax, accounting, insurance or investment advice. Variable rates are subject to change. All funds are in Canadian dollars unless otherwise indicated. The balance shown for the borrowings is the principal balance only. The actual payout amount may differ.

Product name: RRSP Loan

Status: Active

Current borrowings: \$10,000.00

Current interest rate: 3.700%

Payment amount: \$850.13

Payment due date: September 15, 2022

Payment frequency: Monthly

Opened date: August 30, 2022

Maturity date: August 15, 2023

Advisors / Consultants

Statement and Notification Preferences

Email address:

Statement preference: Paper

Send notifications? No

Statements for 1713489

2020

Document	Document Type
December 31, 2021	Statement
December 31, 2021	Insert

Change History - Statement and Notification Preferences

2022