

Avoiding power of attorney not in good order business

Approximately 80% of Power of Attorney's received by head office either do not include the Identification Verification form (IDV) or the IDV form is missing the required information.

To avoid not in good order business when submitting Power of Attorney documentation, follow the process outlined below:

- Step 1:** Power of Attorney documentation is received from your client.
- Step 2:** Schedule an in-person meeting with the individual or agent authorized on the Power of Attorney to act on behalf of your client.
- Step 3:** Complete section 1, 2, 3 and 4 of the Identification Verification Form to ascertain the identity of the individual authorized to act with respect to an account or borrowing facility held by the account holder or borrower named with Manulife Bank. You can find the Identification Verification form by searching for form number **AB0487E** on Advisor Portal.
- Step 3a:** Refer to Schedule "A" on the second page of the Identification Verification Form. It will provide you with guidelines of which documents can be used to verify the identity of the authorized individual(s) under the Power of Attorney.

Step 4: Send the Power of Attorney document along with the completed and signed Identification and Verification Form to Advisor Support Centre

By email: advisorbank@manulife.ca
By fax: 1-866-840-6425
By mail: Manulife Bank of Canada
 500 King Street North, Suite 500-MA
 P.O. Box 1602 STN Waterloo, ON, N2J 4C6

Please note: When opening a new account with a Power of attorney, follow your usual process for opening an account through BankLink and submit all required documentation (Completed POA, completed and signed Identification Verification form, etc.)

If you have any questions, please contact the Advisor Support Centre by phone at 1-800-567-9170 or by e-mail to advisorbank@manulife.ca.