Manulife

Client E-Delivery Process

After your application for insurance is approved you will receive an email from Manulife which will give you access to your policy documents and contract. Review all documents and the application prior to signing. Your advisor can assist with this review.

- Ensure you are using one of our supported browsers:
 - Microsoft[®] Edge
 - Firefox (for Windows)
 - Apple® Safari® (for Mac and iPad)
 - Google® Chrome® (for Windows)
- You will receive your **authentication code** via text message. This code is required to access your contract via email.
- Turn off your pop-up blockers.
- Action the email promptly as the link to the policy documents will expire after 30 days.
- You have a maximum of three attempts to enter the authentication code correctly. After three failed attempts, you will be locked out.
- Contact your advisor if you haven't received the email, the authentication code, you are locked out, or the email link expires.

Step-by-step process for clients

E Delivery by email You will receive an email from Manulife via DocuSign. Open the email and click Review **Manulife** Documents, highlighted in yellow, to start the process. Note! If the email isn't in your inbox, check your spam/junk mail folder. Manulife sent you a policy to review and sign. You must sign the policy in the Canadian province or territory where you permanently reside **REVIEW DOCUMENTS** Verify your mobile device number is correct, Security check then click Send Text. Text message authentication To open your policy package, you must confirm your identity using your cell pho We're going to text you a DocuSign authentication code. You'll receive our text at the n This policy package is for Kevin Client Step 1: Choose a number below, click SEND TEXT, then follow steps 2 and 3 on the next screen **Note!** A six-digit code will be sent to your •1 416-555-5555 mobile device. This code is required to SEND TEXT CANCEL ve a text at t mber right now, click CANCEL and try again when you access the policy documents and contract via email.

3.	Enter the six-digit code and click Confirm Me.
3.	Me.

N N N N N						
Text message authentication						
We've sent a text message to your	cell phone. You should	receive it in a mome	ent. It's okay to leave [DocuSign to open our	text, but don't close this wi	ndow.
Step 2: Open our text and take not	e of your DocuSign aut	hentication code.				
Sten 3: Return to this screen and e	nter your DocuSion aut	hentication code intr	o the field below then	click CONFIRM ME		
otep of neturn to this dereen and e	mer your boouoign au	nonnounon oooc inte	o the held below, then	CHOICE CONTINUE.		
	CONFIRM ME	CANCEL				
If you don't receive our text, click C	ANCEL. Check the nun	ber and try again.				

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4 Read the **Electronic record and signature disclosure** provided as a hyperlink. Once reviewed, select the checkbox to agree to the terms and conditions.

Click Continue.

5. Click **Start** on the first page of the contract. The yellow tab to the left will change from **Start** to **Next**.

The easiest way for you to review and complete all the required paperwork in sequential order is to continue through the contract by clicking **Next**.

Note! Review each document and the application with your advisor before signing.

- Please review the documents below.

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 C

 Docdign Envelops ID: AS221878 6CD6-4676-4637-6400AD18928

 NEXT
 Docdign Envelops ID: AS221878 6CD6-4676-4637-6400AD18928
 - NEXT
 Policy checklist
 How do I complete and sign the documents assigned to me?
 As you scroll through this policy package, you'll find the documents above, as well as others that you should review with your advisor. Documents assigned to you are marked with highlighted fields and SIN buttons.
 Highlighted fields: You'll se highlighted fields wherever we need more information from you. Click on each field and enter the need.
 SiN buttons: You'll see buttons marked SIN wherever we need your signature. Click on each button and follow the instructions to add your electronic signature.
 When you'r ereviewed, completed and signed all the documents assigned to you, click FINISH in the top right comer of your screen. You'll receive confirmation, and the chance to download or print your policy package.
- 6 You should only sign the delivery receipt if all statements are true.

Use **Decline to sign*** under **Other Actions** when:

- You require a change in product, coverage amount or premium.
- An answer to a question in the application is incorrect.
- There is a spelling error or date of birth error.
- The statements on the delivery receipt are no longer true.
- You do not want the policy.
- You are not physically in Canada at the time of signing.

*Declining to sign **does not** close your application. You can provide the reason you are declining along with your instructions within a text box after selecting Decline to sign.



Please Review & Act on These Documents

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Decline to Sigr	1	×
Please provide a reason	for declining:	
500 characters remaining		
DECLINE TO SIGN	CANCEL	

If all statements on the delivery receipt are true and you have no reason to decline to sign, click Sign to add your signature and enter the city and province where you are signing. Once complete, click Finish .	If you have read and agree with all the statements above, sign below. We use the information you have provided in this application to determine if you are eligible for the coverage you're applying for. If you misrepresent any facts or the information you provide is not current, correct and complete, we can cancel any policy we have issued based on the information you have provided. Signatures Signature of Location of signing City or town Province
Then, click Continue to close the pop-up window.	You're Done Signing 🖄 🖶 🕯
	You may download or print using the icons above. After all recipients finish signing, you will receive an email with a link to the document.
	CONTINUE
7 A final email will arrive confirming the documentation is complete.	III Manulife
You have 60 days to save or print the contract received via email. Make sure to download or print it for your records.	This policy is signed!
	We've received all the signatures we need for this policy. Click VIEW COMPLETED DOCUMENTS to view the documents we sent you before, this time with signatures. IMPORTANT: If you're a policy owner, you should keep a copy of the signed documents for your records. You now have 30 days to save or print these documents. After 30 days, they will no longer be available from this email and you will need to contact your advisor. You'll find download and print icons at the top of the view screen.
 In the final email, you'll find an option to register on our customer secure site, where you can access and manage your insurance information option 	Did you know? Once you register on our customer secure site, you can access and manage your personal insurance information anytime, anywhere, Review policy details, download
Information online.	statements and notices, update your address, and more. Please allow up to 72 hours after receiving this email to register.
the email before registering. This gives us time to ensure everything is ready for you.	Register