



Products & Services

Telephone and Online Banking Services

Saving time and managing your finances has never been simpler with the ease and accessibility of telephone and online banking!



Manulife Securities Telephone and Online Banking: An Overview

The deposit service for clients of Manulife Securities Investment Services Inc. offers you the ability to transfer Canadian funds from the comfort of your own home, if you are set up for telephone or electronic banking with one of the major banks. This service may allow you to transfer funds to your Manulife Securities accounts 24 hours a day, 7 days a week, depending on your bank.

Manulife Securities Investment Services Inc.

is an independent distributor of mutual funds, RRSPs, RRIFs, Group RRSPs, fee-based wrap programs, systematic withdrawal plans and other specialty investment products. You have access to a comprehensive suite of investment products and services designed to address a wide range of financial needs. Manulife Securities Investment Services Inc. is a Member of the Mutual Fund Dealers Association of Canada (MFDA) and the MFDA Investor Protection Corporation (MFDA IPC), excluding Quebec.



What are the benefits?

- You can ensure that your money is deposited in your account, even if you don't have time to meet with your Manulife Securities advisor
- Transfer funds to your Manulife Securities account from anywhere in Canada, 24 hours a day/ 7 days a week (depending on your bank), by using your bank's telephone and online banking service
- Save the cost of personal cheques and stamps
- Save time by transferring funds at your convenience, without having to leave home!

How do I sign up for this service?

If you are new to telephone or online banking, call your bank's customer service centre to find out how you can sign up.†

If you are already set up for either telephone or online banking, simply contact your bank's customer service centre and ask to have Manulife Securities set up as a vendor or payee, or visit your online banking site and add Manulife Securities Investment Services Inc. as a vendor or payee yourself.

Please note that in order to avoid delays in processing your payments, you must provide the correct name of the firm and the account number that you wish to be able to transfer funds to. Your account number is located on the front page of your Manulife Securities statement.

Clients can make deposits directly into their Manulife Securities Canadian dollar accounts. Simply add Manulife Securities Investment Services Inc. as a payee on your internet banking or electronic bill payment facility to transfer cash.

† Please note that there may be fees levied by your bank for their telephone and/or online banking service.

Are there any restrictions?

Depending on your bank, there may be restrictions to the maximum amount you may transfer to your Manulife Securities account through telephone and online banking. Your bank may also have restrictions set-up specifically on your account for these types of transactions. To find out more about payment restrictions, please contact your bank directly.

Payments are received in Canadian dollars only. If funds are sent from a US\$ bank account, there will be a currency exchange to Canadian dollars.

How can I track my payment(s)?

When processing your payment via telephone and online banking, you will receive a confirmation or reference number which you should retain for tracking purposes. In the event that Manulife Securities does not receive your payment, you will need to track it through your bank with the confirmation or reference number.

How long does it take to process my payment(s)?

Payments typically take one to three business days to arrive at Manulife Securities.

Do I need to tell my Manulife Securities advisor that I have made a payment by telephone and online banking?

Yes. Once the payment has been processed, you should notify your Manulife Securities advisor. You may need to discuss any applicable investment instructions. Payments to a Registered Plan (for example, an RRSP) will be coded as a contribution. Payments to an SRSP will be coded as a spousal contribution.

Which banks are participating?

The banks that are currently participating in this service are:

If you bank with...	The Manulife payee name is set up as...
Manulife Bank	Manulife Securities Investment
Bank of Montreal (BMO)	Manulife Securities Investment Srv.
Bank of Nova Scotia (Scotia Bank)	Manulife Securities Investment
Canadian Imperial Bank of Commerce (CIBC)	Manulife Securities Investment
Central 1Credit Union	Manulife Securities Investment Services Inc
Desjardins	Manulife Securities Investment Services Inc
HSBC	Manulife Securities Investment Ser Inc
Laurentian Bank	Manulife Securities Inv. Ser
National Bank of Canada	Manulife Securities Investment Services Inc.
President's Choice Financial	Manulife Securities Investment
RBC Royal Bank	Manulife Securities Inv. Ser. Inc.
Tangerine Bank	Manulife Sec Inves Srv
Telpay	Manulife Securities Investment
Toronto Dominion Bank (TD Canada Trust)	Manulife Securities Investment Services

Please contact your Manulife Securities Investment Services Inc. advisor with any questions.

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