

## Enrolling a member

### Introduction

This quick how-to video tutorial guides the viewer on enrolling a member for their group retirement plan.

### Onscreen

Upbeat music plays in the background and the Manulife logo appears on top of the left side of the screen.

### Onscreen

A finger pressing the button along with the surrounding starts glowing. A navy blue background slides and occupies a third of the screen on the left side. The text “Enrolling a member” slides to the left side of the screen.

### Onscreen

The background changes from navy blue to green. A laptop image slides from the left side to the right side of the screen. On the left side, the text “You can quickly and easily add a member to your plan online!” appears.

### Onscreen

The laptop’s screen begins to pop out in three stacks making a 3D effect. The text “Simply sign into the Group Retirement secure sponsor site and follow these steps.” also appears on the left side of the screen.

### Onscreen

The background changes from green to navy blue. A laptop image slides to the left side of the screen. Inside the laptop screen is the home page for the Group Retirement Savings Plan (RSP). A transaction icon pops out along with the text “Select Transactions.” on the right side of the screen. A cursor icon appears on the screen and hovers over the navigation bar on the left side of the laptop’s screen. The Transactions button scales up, surrounded by coral strokes, then the mouse clicks the button.

### Onscreen

The laptop’s screen loads to the Transactions page and the text “Choose Enroll a member.” along with the Enroll a member icon, pops out at the right side of the screen. The mouse icon hovers on the Enroll a member button under Enrollments section as the section scales up and is surrounded by coral strokes.

### Onscreen

The laptop’s screen loads to the Enroll A Member page. The text “Enter the Member’s information.” along with the Member’s information icon pops out on the left side of the screen. The current page scrolls down and the Member information section scales up with coral strokes as textboxes for the name, date, S.I.N., marital status, service start date, and plan entry date start to fill up one by one. The mouse icon hovers and clicks the Continue button.

## **Onscreen**

The member information section scales down to its original size, and a new text, “Manulife requires the member’s signature on file, so be sure to check one of the two options.” along with a form icon, pops out on the right side of the screen. The Enrollment form section on the laptop’s screen scales up with coral strokes while the mouse icon hovers and clicks the second option saying, “Manulife Financial will send an Enrollment Action Form to the Plan Member for verification and signature.”

## **Onscreen**

The laptop’s screen loads to the Member Contact Information page and start to scale up with coral strokes. The text “Enter the member’s contact information.”, along with a phone icon, pops out on the right side of the screen. Textboxes for address, contact number, and email start to fill up one by one. The mouse icon hovers and clicks the Continue button.

## **Onscreen**

The laptop’s screen loads to the Beneficiary page and textboxes under Beneficiary, Relationship, and the percentage will be filled. Textbox for Date beneficiary was designated such as the Day, Month, and Year is filled. A person holding a pen icon along with the text “Enter the member’s beneficiary information.” appears on the right side of the screen. The cursor icon scrolls down to the Continue button and clicks it.

## **Onscreen**

The laptop’s screen loads to another page. The text “Enter the member’s investment instructions.”, along with an icon pop out on the right side of the screen. The section for “No plan member investment directions” and “No member directions” scales up with coral strokes. A rectangular coral shape with text inside, “Click the button. No member directions if the member has not provided investment instructions.” will also appear below the scaled-up sections. Sections scale back while the rectangular coral shape and the text inside disappears. The cursor will click the Continue button.

## **Onscreen**

The laptop screen loads to the Investment Option page, and the page consists of multiple options for investment with a textbox beside each option. The current page scrolls down, and input “100” inside the textbox beside option 2045 ML Retirement Date 2045. The cursor icon clicks the Continue button.

## **Onscreen**

The laptop screen loads to the Information display page, and the text “Verify the information.” appears on the right side of the screen as the page scrolls down and the cursor clicks the Submit button.

## **Onscreen**

The current text slides and exits to the right, and the laptop also slides and is placed on the right side of the screen. A green background slides from the left side of the screen and occupies almost half of the background. A thumbs up icon will pop out on the left side of the screen, and a text “You’re done!” will also pop out. The current page inside the laptop’s screen will load to the Member Information page.

## **Onscreen**

The current scene will fade out while only the navy blue background remains on the screen. The text “Just a few easy steps” will appear at the center of the screen. A mouse will also appear, and the text “and the member is enrolled!” is surrounded by a green rectangular stroke.

## Onscreen

A few seconds after, the Manulife logo zooms in to the scene. A disclaimer fades in at the bottom part of the screen. The disclaimer states, “The Manufacturers Life Insurance Company (Manulife). Group Retirement products and services are offered by The Manufacturers Life Insurance Company (Manulife). Manulife, Stylized M Design and Manulife & Stylized M Design are trademarks of the Manufacturers Life Insurance Company and are used by it, and its affiliates under license. 2023 The Manufacturers Life Insurance Company. All rights reserved. Manulife, PO Box 396, Waterloo, ON N2J 4A9.”. The scene fades out as well as the background music.



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