

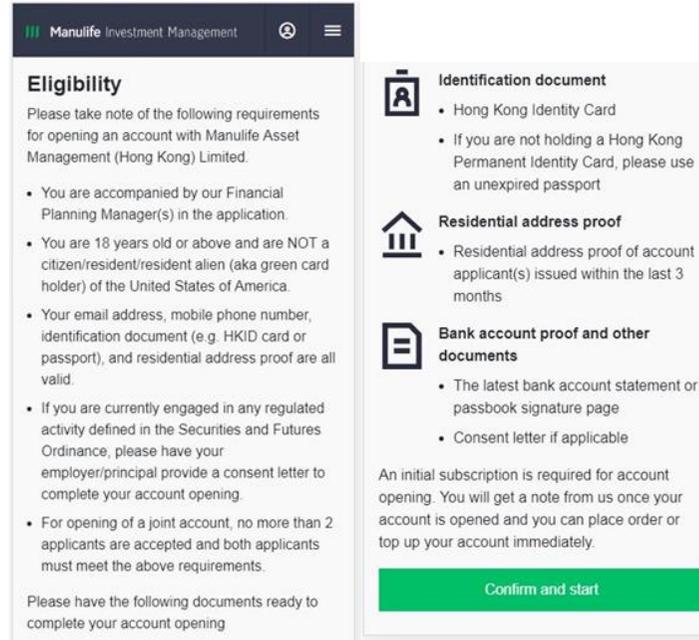
Manulife iFunds: A Quick Guide

How can I open a new account?

You will need your Financial Planning Manager with you during the account opening process. It will take you around 15 minutes to complete the application.

After your Financial Planning Manager logged into Manulife iFunds platform, he/she can open a Manulife InvestChoice account for you.

1. An **Eligibility screen** will be displayed and you must read through all details and prepare necessary documents. Then, click on **“Confirm and start”**.



The screenshot shows the Manulife Investment Management app interface for account opening. It features a dark header with the Manulife logo and navigation icons. The main content is divided into two columns. The left column is titled 'Eligibility' and contains a list of requirements for opening an account, such as being accompanied by a Financial Planning Manager, being 18 years or older, and providing valid identification and residential address proof. The right column lists the required documents: Identification document (Hong Kong Identity Card or passport), Residential address proof (issued within the last 3 months), and Bank account proof and other documents (latest bank statement or consent letter). A green 'Confirm and start' button is located at the bottom right of the screen.

Eligibility

Please take note of the following requirements for opening an account with Manulife Asset Management (Hong Kong) Limited.

- You are accompanied by our Financial Planning Manager(s) in the application.
- You are 18 years old or above and are NOT a citizen/resident/resident alien (aka green card holder) of the United States of America.
- Your email address, mobile phone number, identification document (e.g. HKID card or passport), and residential address proof are all valid.
- If you are currently engaged in any regulated activity defined in the Securities and Futures Ordinance, please have your employer/principal provide a consent letter to complete your account opening.
- For opening of a joint account, no more than 2 applicants are accepted and both applicants must meet the above requirements.

Please have the following documents ready to complete your account opening

Identification document

- Hong Kong Identity Card
- If you are not holding a Hong Kong Permanent Identity Card, please use an unexpired passport

Residential address proof

- Residential address proof of account applicant(s) issued within the last 3 months

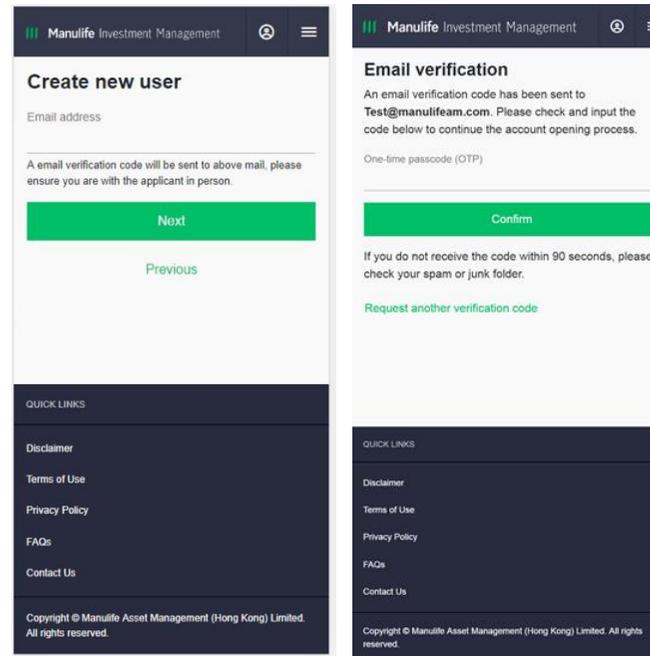
Bank account proof and other documents

- The latest bank account statement or passbook signature page
- Consent letter if applicable

An initial subscription is required for account opening. You will get a note from us once your account is opened and you can place order or top up your account immediately.

Confirm and start

2. Enter your email and click on **“Next”**. An email verification code will be sent to you.
3. You will then be requested to input a one-time passcode that sent to your registered email.



4. Select Single account or Joint-name account you want to open. Then enter the required information and click on “Next”.

The required information includes:

- Personal information
- Employment information
- Contact information

Step 1 | Your personal information

Personal information

I would like to open an account

Single account

Joint-name Account

Title
Mr.

Given name
Tai Man

Surname
Chan

Date of birth
01 Jan 1990

ID type
Hong Kong Identity Card

ID number
C668668E
eg. A123456(7) input as A1234567

Place of birth
Hong Kong

Citizenship/Nationality
Hong Kong

Tax Residency under Common Reporting Standard

I am a tax resident of Hong Kong

I am a tax resident of another country/jurisdiction

Next

Step 1 | Your personal information

Employment information

Employment status
Employed

Highest educational qualification
University or above

Current employer's name
Manulife Asset Management

Business nature of current employer
Finance

Current position
Manager

Annual income
HKD300,001 – HKD600,000

Total Liquid Assets
HKD250,000 – HKD500,000

Sources of Wealth and Funds
Savings Investment Income

Are you currently engaged in any regulated activity defined in the Securities and Futures Commission Ordinance?
 Yes
 No

Are you or have you been entrusted with prominent public function?
 Yes
 No

Are you an immediate family member or a close associate of an individual entrusted with prominent public function?
 Yes
 No

Next

Previous

Step 1 | Your personal information

Contact information

Email
Test@manulifeam.com

Mobile phone number
Hong Kong (+852)

Address

Permanent residential address

Room/Floor/Block/Name of building/Estate

Street number/Street name/District

Region/Country
Hong Kong

Same for correspondence address

Next

Previous

DISCLAIMER

Disclaimer
Terms of Use
Privacy Policy
FAQ
Contact Us

© Manulife Asset Management. All rights reserved.

5. Upload your **HKID/Passport, Residential address proof** and other supporting documents.

Your Financial Planning Manager will validate the information input against the document proof, then simply take a photo or upload image.

(Make sure all uploaded photos need to be clear, in focus, and show all four corners of each document.)

6. Choose the account type you prefer. Then provide details of a HKD bank account in your name as your designated bank account. Provide your **bank statement proof** by taking a photo or uploading image. Click on **“Next”** to proceed.

7. Complete a **Risk Profile Questionnaire** that contains 6 questions to access your risk tolerance and attitude.

8. After completing the questionnaire, your risk profile score will be calculated and displayed. Read the details of risk profile derived from questionnaire. Click on **“Confirm”** if you agree to the score.

9. An account summary will be displayed for your review.

Verify all information and the photo quality. Click on **“Edit section”** if you want to edit the information in the section. Click on **“Next”** to proceed.

The screenshot displays three panels from the Manulife Investment Management account setup process:

- Account summary:** Shows personal information for Mr. Tai Man Chan, born 1990/01/01, with an HKID. It also includes account details such as an Asset-based Account with Bank of China (Hong Kong) Limited, account number 123456789, and a transaction limit of HKD 20,000. The tax resident status is confirmed as Yes.
- ID card / passport photo page:** Displays scanned images of an ID card and a passport photo, with an 'Edit section' link for verification.
- Risk profile questionnaire:** Shows the user's financial stage as 'Young with some financial burden', investment experience as '3 years to less than 5 years', and an investment objective of 'Income-and-growth - achieve returns on the balance of modest income and capital appreciation'. A 'Next' button is highlighted in green.

10. Declaration and Client Agreement are accessible from the link on **Customer Confirmation** page. You are required to give necessary consents.
11. You are required to provide your signature either by doing an e-signature or uploading your signature.
12. Verify your phone number and it will be used for further identity verification and transaction. Click on “**Next**” to proceed.
13. A one-time passcode that will be sent to your registered mobile number via SMS. Enter the OTP received and click on “**Confirm**” to complete the account opening process.
14. After your Financial Planning Manager confirms your application, a thank you page with a reference number will be displayed. An acknowledgement email will be sent to you and instruct you how to get start.

Manulife Investment Management

Step 6 | Review details

Customer confirmation

Declaration and acceptance

I consent to the attached declaration and acceptance

I agree to use the e-Signature below for entering into the Client Agreement of Manulife Asset Management (Hong Kong) Limited and give revocable consent to the "Electronic and Other Communications" section therein

Do you want to do an e-signature or upload your signature

I want to e-sign

I want to upload my signature

Chan

First holder's e-signature

Manulife Investment Management

Verify your phone number

To complete the application, we will verify the phone number and it will be used for future identity verification and transactions.

First account holder mobile phone no.

Hong Kong (+852)

9339 9339

Next

Previous

Manulife Investment Management

Step 6 | Review details

Verify your contact

One-time passcode has been sent to 9339 9339. The OTP is valid for 90 seconds. Please ensure your mobile phone is switched on to receive the one-time passcode via SMS.

Enter OTP received by first holder

Confirm

Didn't get the passcode? If 90 seconds have passed, please request a new passcode by clicking below link.

[Request another passcode](#)

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Thank you

Your client have completed our online account opening process. An official confirmation will be sent once we completed all necessary checks.

Reference Number : HK-20190712-1030013533

What's next?

Please advise your customer to login using the link in the confirmation email. They will be able to add balance and place the first investment right away.

Confirm

How do I get started?

After receiving your Manulife InvestChoice application, you should receive an acknowledgement email to help you get started.

1. Click on the login link (ifunds.manulifefunds.com.hk) in the acknowledgement email.
2. You must provide your HKID/Passport number and your mobile number for verification purposes.
3. You will then be requested to input a one-time passcode that will be sent to your registered mobile number via SMS.

After your first login, you will be required to create a new password.

Besides the link in the acknowledgement email, you can also login by inputting the link (ifunds.manulifefunds.com.hk) or scanning the QR code. At the landing page, you click on the account profile button on the top right hand corner to login.

Protecting your account

For enhanced security, you are required to provide your identification document number associated in order to access your online account. A One-time passcode (OTP) will be sent to the mobile number below, and the number will later be used for all online account activities.

ID type: HKID
ID number: K220****

ID number
K22001230

Mobile number
Hong Kong (+852) 9123 4567

Next

Identity authentication

An one-time passcode has been sent to +852 91** **67. Please enter the code below to create an online account.

One-time passcode
123456

Confirm

Didn't get the passcode? If one minute has passed, please request for a new passcode by clicking below link.

[Request another passcode](#)

Create password

Please create a password below and you will be able to access Manulife iFunds anytime anywhere.

Password
●●●●●●●●

Your password must contain a minimum of 8 characters, including upper and lowercase letters, and at least one number and one special character.

Confirm password
●●●●●●●●

Confirm

