

Manulife iFunds: A Quick Guide

How do I make a transaction?

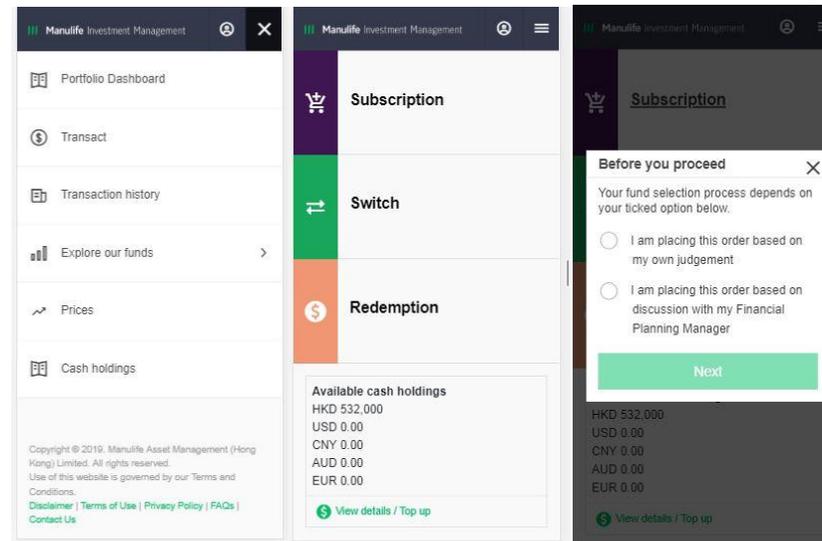
You can manage your portfolio anytime, anywhere by logging into your Manulife InvestChoice account.

You can place your instructions by clicking on the menu button at the top right hand corner and select the transaction type you want. Your Financial Planning Manager can always guide you through all of the required steps.

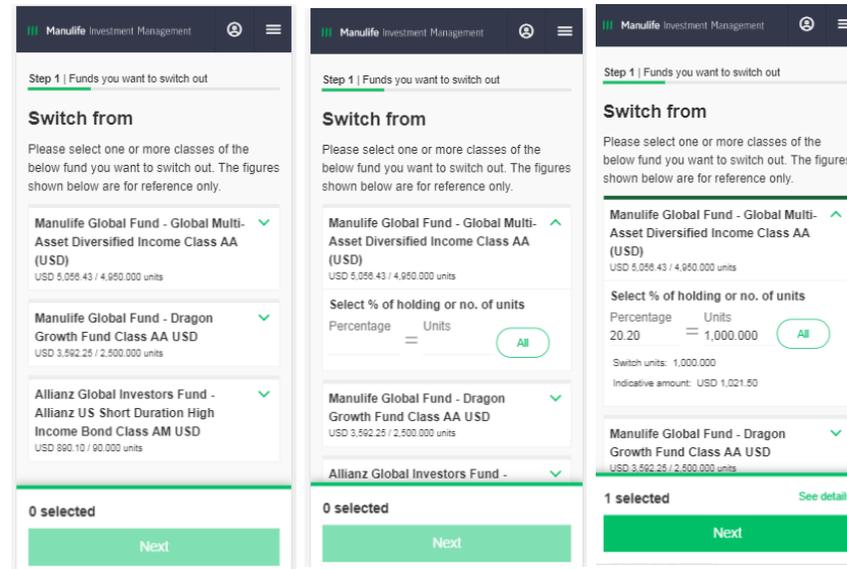
Switch

To place a switch order, click on the menu button at the top right hand corner. Click **“Transact”** and then click on **“Switch”**.

1. You will be asked a question about your fund selection process, whether it is based on your own judgement or in response to a discussion with your Financial Planning Manager.



- A list of your fund holdings will appear.
- Select the fund you want to switch out of, and enter the percentage or number of units. You can also simply click on **“All”** to switch out all units.

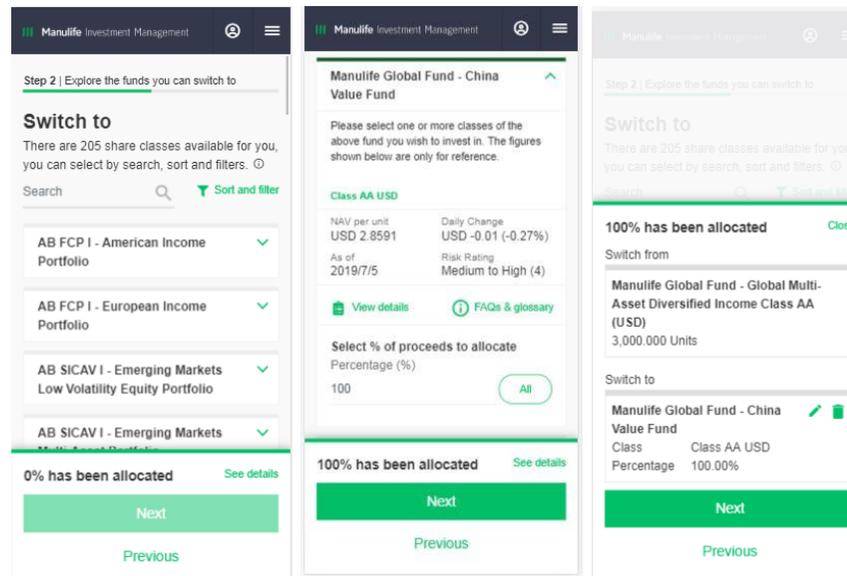


- Click **“Next”**. A list of funds which are available to switch into will be shown.
(Funds that do not match with your client profile or risk appetite will be greyed out and not clickable.)

Basic information will be shown after the fund and its share class which you want to switch to are selected. You can click on **“View details”** for more information for the fund.

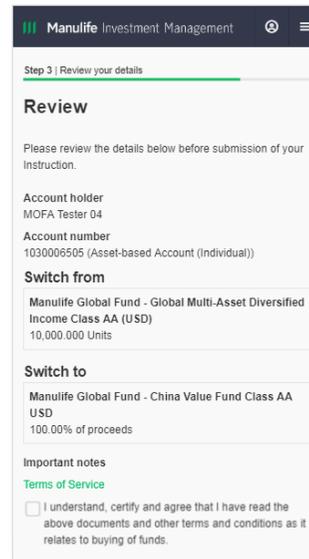
To proceed, enter the percentage of the proceeds you want to allocate.
(The system will alert you if the input amount is lower than the minimum subscription amount.)

To review the details or edit your instructions, click on **“See details”** at the bottom right hand corner.



5. Click “**Next**”, and a review screen will be displayed.

After reviewing all of the details and providing the necessary consent, click on “**Submit**” to proceed.



6. A thank you page with a reference number will appear.

