

In order to update your account, please complete the form below. If you have questions on this form, please contact Manulife John Hancock at 833-752-9167 between 8:30am-6:00pm, Monday-Thursday, and 8:30am-5:30pm on Friday EST.

**Please print in capital letters**

## 1. Current account information

Account name

Account number (if available)

TIN/SSN

Previous advisor name

Previous firm name

## 2. Transfer Information

New advisor name

Firm name

Branch name and number (if applicable)

Representative ID number

New account number

Phone number

Email

## 3. Custodian Information (If applicable)

Previous custodian name

New custodian name

Custodian account number

Custodian tax I.D.

New custodian acceptance authorization

Place custodial acknowledgment or stamp here

## 4. Signature

Please sign below to confirm the transfer of your account from one financial institution to another.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name (Print)

\_\_\_\_\_  
Title (Print)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name (Print)

\_\_\_\_\_  
Title (Print)

\_\_\_\_\_  
Date

Executed forms should be sent to the new custodian.

**DocuSign can be used on this form.**