# Manulife iFunds: A Quick Guide

### How can I open a new account?

You can complete the account opening application online, which takes around 15 minutes.

Please have the following document with you:

- HKID/Passport
- Residential address proof issued in the last 3 months
- Bank account proof issued in the last 3 months

Our designated Manulife Investment Fund Intermediary will request to meet with you to certify the documents and complete the account opening process for you.

## (Account opening)



2



Enter the Personal and Select to open Single Contact information Or Joint-name account the click on "Save & and enter your Manulife Investment Fund Continue" Intermediary Code (if any) • • • • • . . . . . . • • • • • • • • • • • Manulife Manulife Investment Management Manulife Manulife Ξ Investment Management Investment Management Investment Management Cash Account Contact Information -0 - 0 - 0 - 0 - 0 - 0℅ Phone number and email address Do you have a Manulife Investment Fund Intermediary with an SFC-license to serve you? Account Options Area code Yes Personal Information You are applying for a Trade-based Account\*. +852 (Hong Kong)  $\sim$ Please **Click here** for more details, including the fee O No rates. Personal Information \*From February 2023 onwards, only Trade-Based account Phone number Please select your language preference for future type is available for new account applicants. communications 51234567 Title • English Select an option Is this account in single or joint name?  $\sim$ Email address Chinese monica ms yu+20230313@manulifeam.com Given name Xi Å Å I have read and agreed to the Terms of Use (n) Residential address and Personal Information Collection Single-name Statement for access to the digital platform, Joint-name account account (up to Manulife iFUNDS. Region/Country Surname 2 applicants) Select an option TONG I consent to the "Use of Personal Data in Direct  $\sim$ Marketing" and "Provision of Personal Data for Use in Direct Marketing" sections in the ID type Address line 1 How do you want to receive your dividends Personal Information Collection Statement HKID Room/Floor/Block/Name of building/Estate  $\sim$  What's this? of Manulife Investment Management (Hong Kong) Limited. (Note: Your consent will enable ID number Address line 2 us to provide you with market analysis from our S1366973 Street number/Street name/District 몽 ŝ investment professionals, and promotional offers such as special discounts, coupons and Date of Birth gift items.) Reinvest in the Pay directly to 05



8.2 Input bank account details to set up your designated bank account then click "Save & Continue"				
	<b>Manu</b> Investi	<b>life</b> ment Manag	ement	
Designated bank account information Please provide details of your HKD bank account or a multi-currency (including HKD) bank account in your name. This Designated Bank Account is used for money deposits into and withdrawn from the Cash Account of your Manulife InvestChoice account. Bank name				
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Select	an optio	in		~
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Bank account number				
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**9.1** Select if you wish to complete the Risk Profile Questionnaire (RPQ) to access your risk tolerance and attitude now or after account opening



Investment Management

Q6. Which of the following best describes your overall investment objective?

Capital preservation - keep investment loss at a minimum with little concern on

Income orientation - earn stable income

Income-and-growth - achieve returns on

Growth orientation - aim at returns with

Aggressive growth - look for maximum

returns possibly from high-risk financial

Previous

the balance of modest income and

focus on capital appreciation

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returns

or beat inflation

capital appreciation

investments

10 Read your risk profile score and click on "Next"



#### Medium (3)

Investors in this category are willing to accept commensurable price fluctuation and take a certain degree of risk so as to achieve returns in comparison with the major stock market indexes.

I acknowledge my risk profile based on my completed answers to the questionnaire and agree that my above risk profile is valid only for the coming 12 months.



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#### Risk Profile

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This questionnaire can help you better understand your risk profile and investment needs.

Do you wish to complete the questionnaire now?

- Yes, I want to complete the Risk Profile Questionnaire now so as to early start my investment in funds.
- No, I will open the account first and complete the Risk Profile Questionnaire later.

Q1. Which of the following best describes your current stage of life? ① What's this?

Young with little financial burden

Young with some financial burden

Middle-aged with little financial burden

) Middle-aged with some financial burden



