

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.

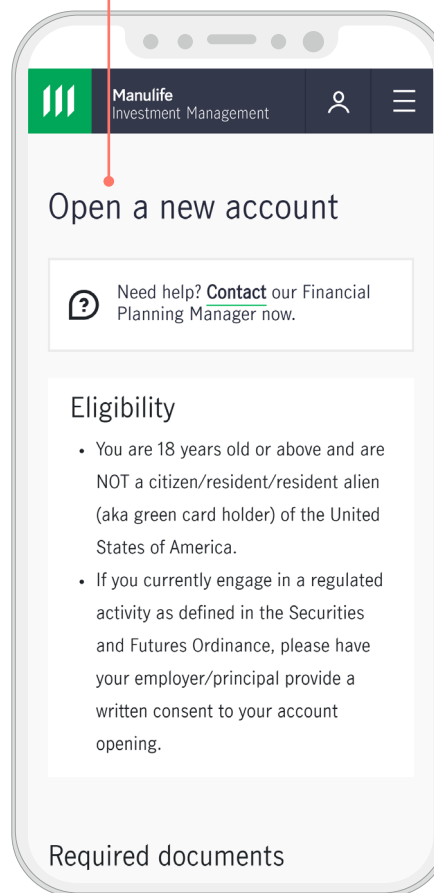
Please have the following document with you:

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

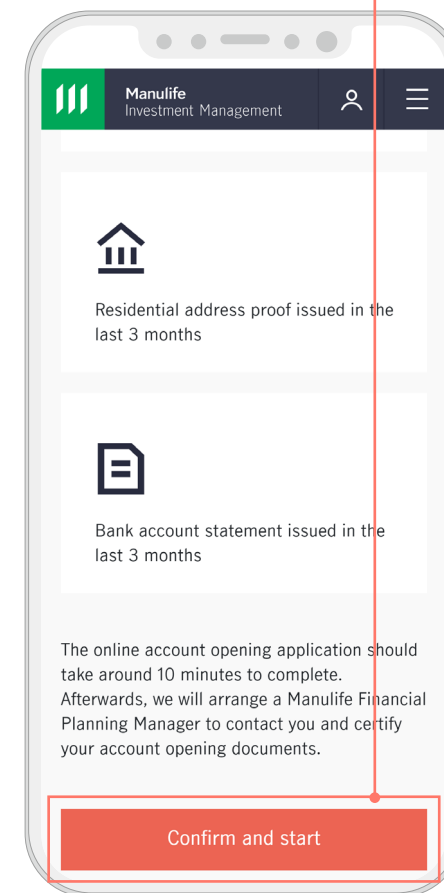
Our designated Financial Planning Manager will request to meet with you to certify the documents and complete the account opening process for you.

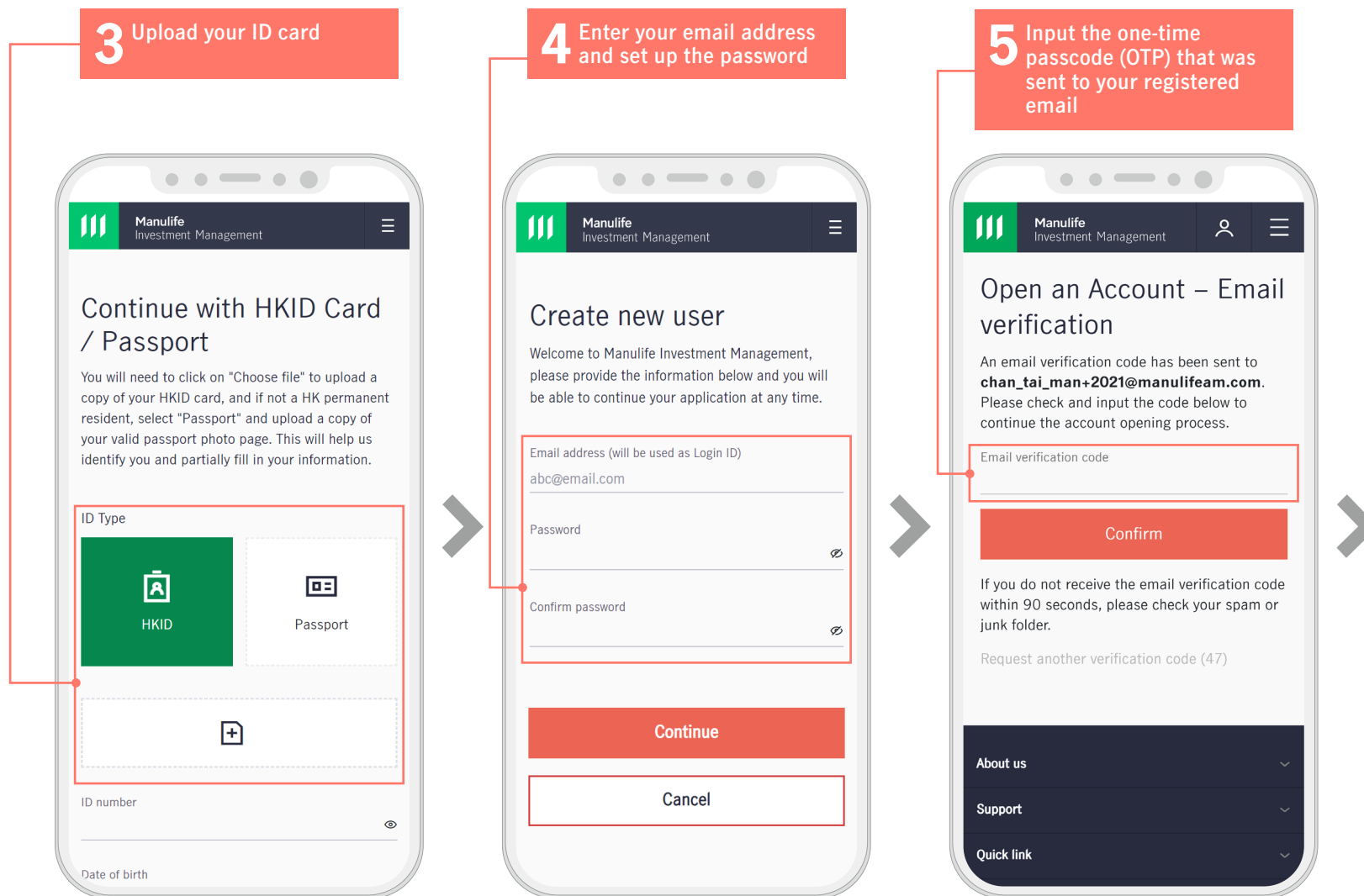
Account opening

1 Go to the [Eligibility screen](#) and read through all details and prepare the necessary documents



2 Click on "Confirm and start"

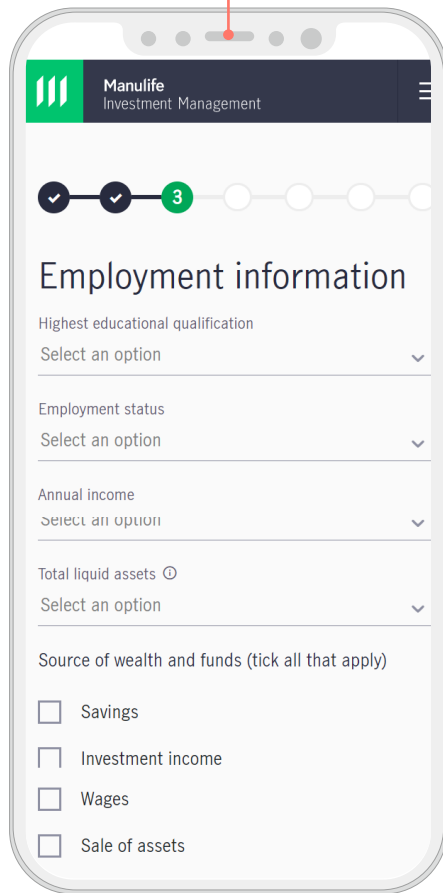




6 Select to open Single or Joint-name account and enter your Financial Planning Manager Code (if any)

7 Enter the Personal and Contact information the click on "Save & Continue"

8.1 Enter the Employment information



Manulife Investment Management

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Employment information

Highest educational qualification
Select an option

Employment status
Select an option

Annual income
Select an option

Total liquid assets ⓘ
Select an option

Source of wealth and funds (tick all that apply)

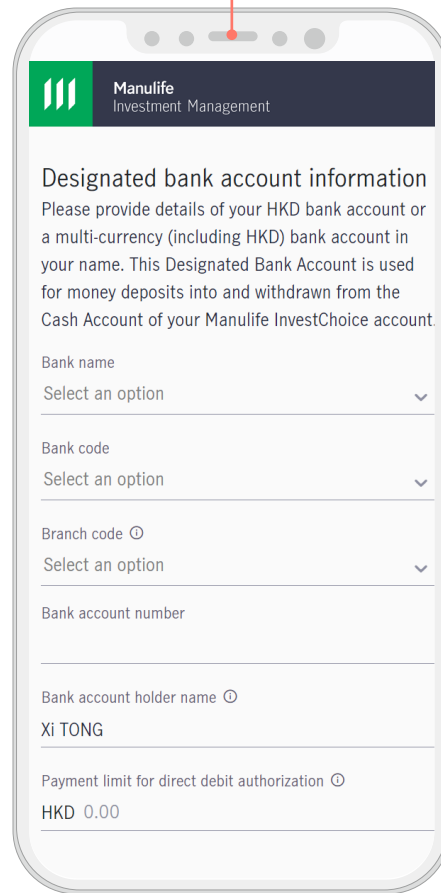
Savings

Investment income

Wages

Sale of assets

8.2 Input bank account details to set up your designated bank account then click "Save & Continue"



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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
Select an option

Bank code
Select an option

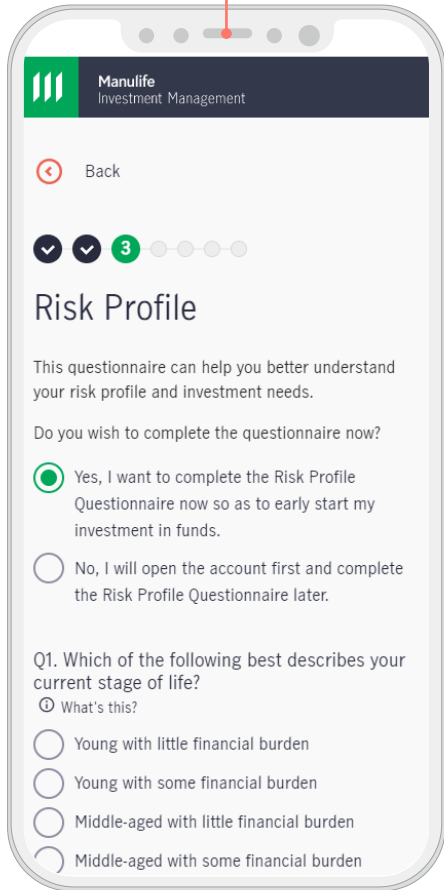
Branch code ⓘ
Select an option

Bank account number

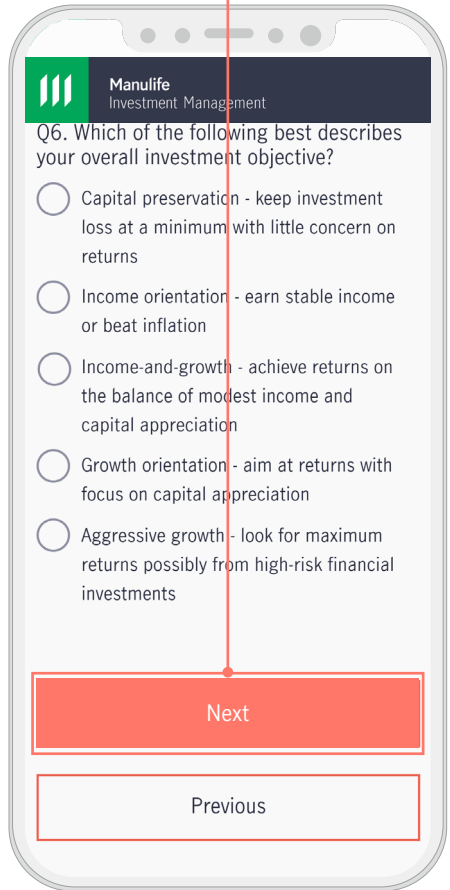
Bank account holder name ⓘ
Xi TONG

Payment limit for direct debit authorization ⓘ
HKD 0.00

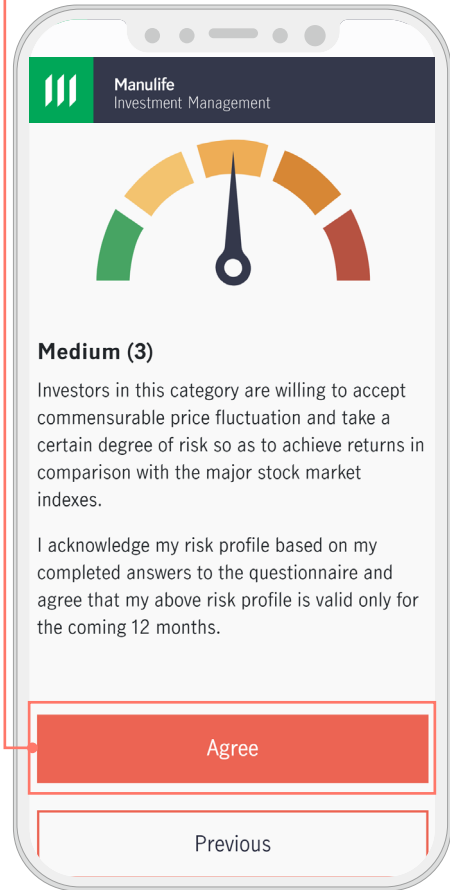
9.1 Select if you wish to complete the Risk Profile Questionnaire (RPQ) to access your risk tolerance and attitude now or after account opening



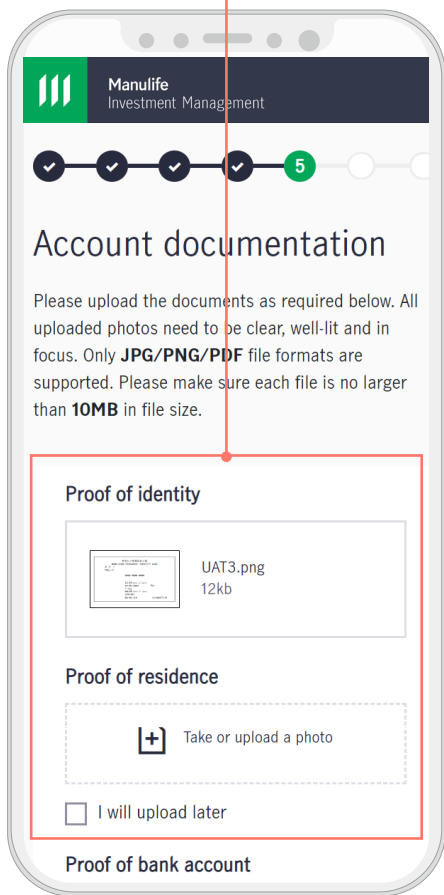
9.2 Click on "Next" if you have completed the RPQ



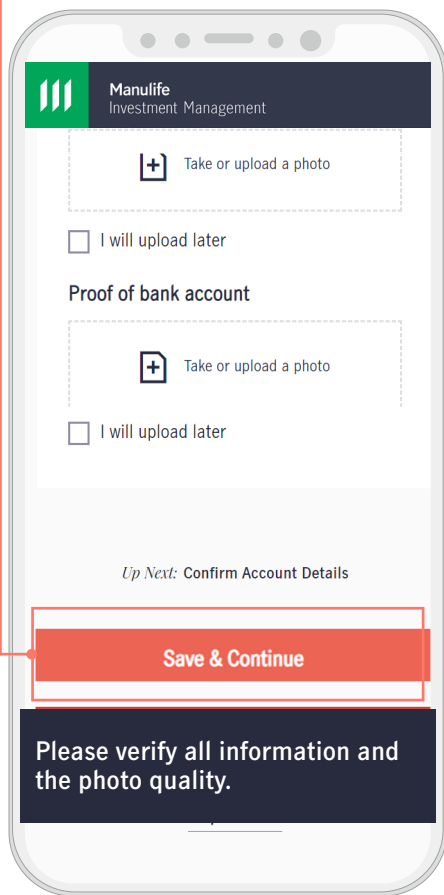
10 Read your risk profile score and click on "Next"



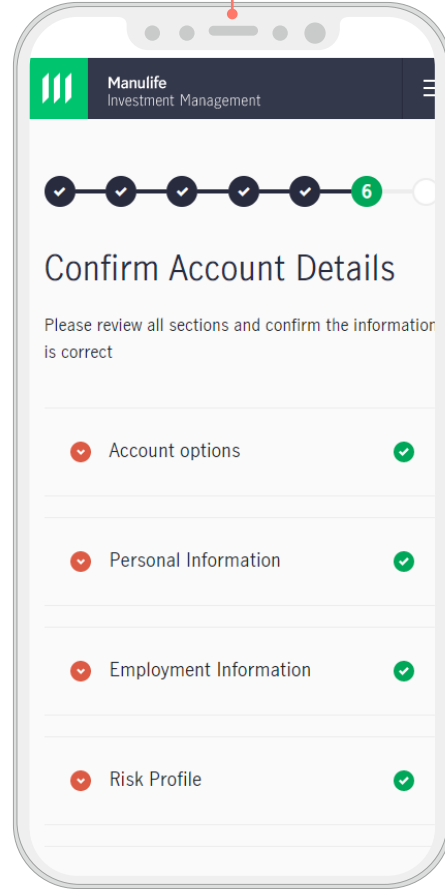
11 Upload the proof of residence and bank account by taking a photo or uploading an image



12 Click on "Save & Continue"



13 Click on each section to view the details you filled in then click on "Save & Continue"



14 Please make necessary declarations

