

Manulife Agency Portal

Registration Process for current Manulife users

Instruction Guide

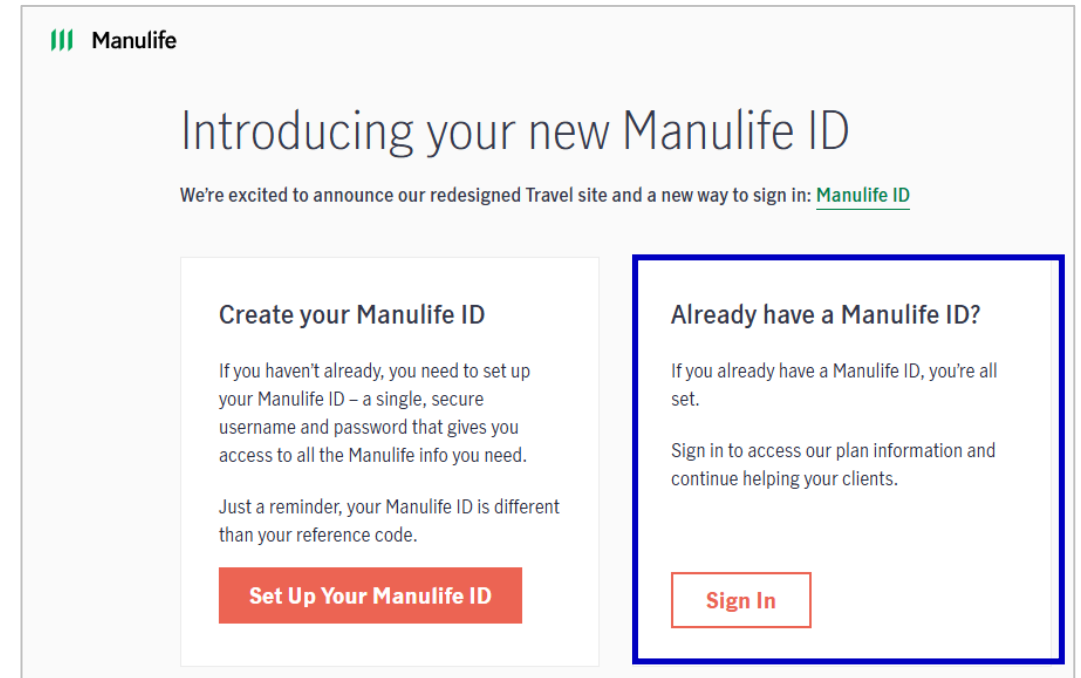
Registration for Current Manulife Users

Sign in with your Manulife User ID

The first time you visit the new booking platform you will need to set up your profile. This step is mandatory and a **one-time only** requirement.

Step 1: Go to: www.manulifetravel.ca

Select “Sign in” under “Already have a Manulife ID?”



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Sign in with your Manulife ID

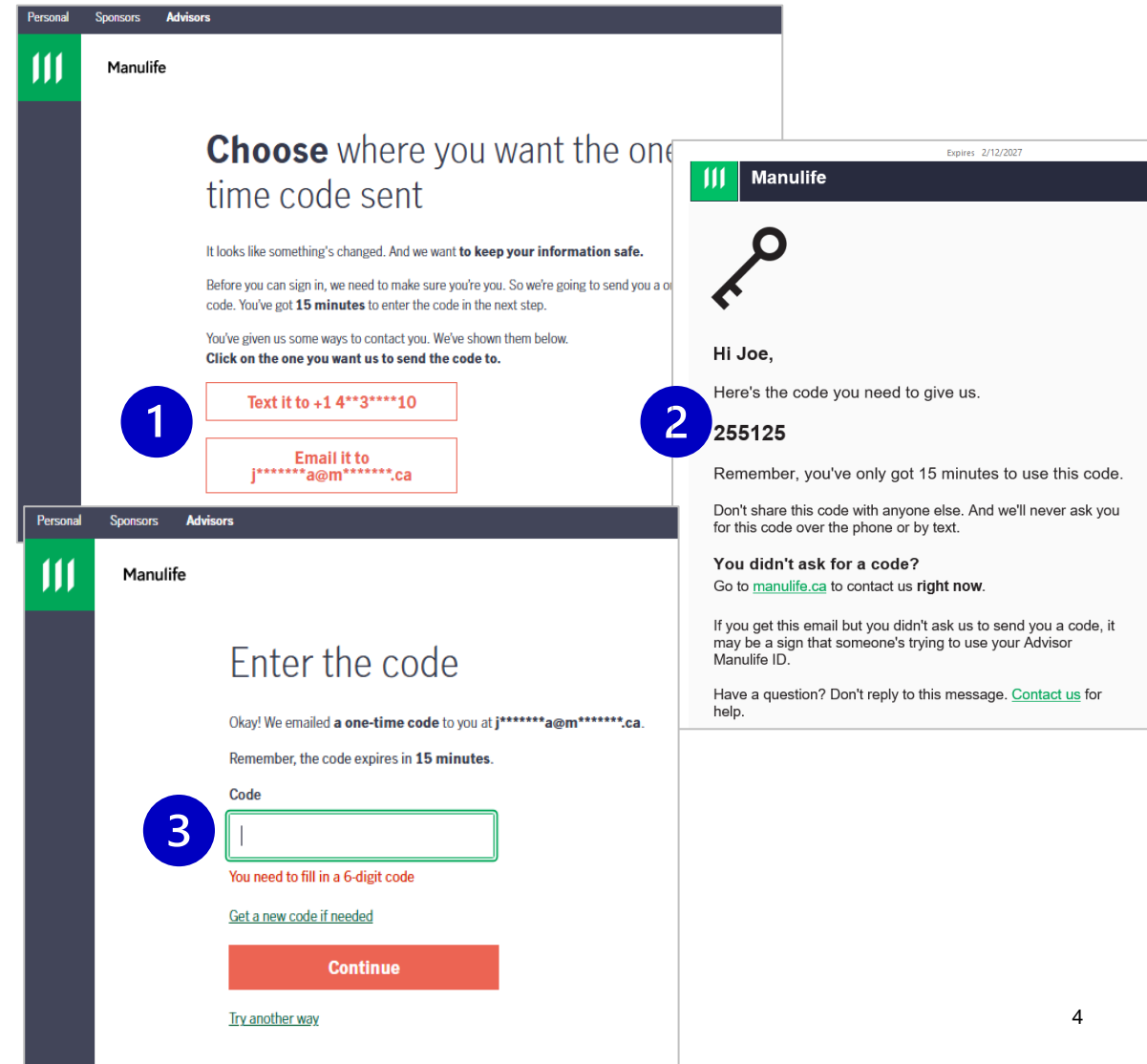
Step 2: Enter your existing Manulife User ID (username) and password and click “Sign in.” If unsure, click on “Forgot Username or Forgot Password”

The screenshot shows the Manulife website's sign-in interface for advisors. The header includes navigation links for 'Personal', 'Sponsors', and 'Advisors', with the 'Advisors' link selected. The Manulife logo is in the top left. The main heading is 'Sign in with your Advisor Manulife ID'. Below this, a prompt says 'Please fill out everything.' The sign-in form is highlighted with a blue border and contains the following fields: 'Username' (with the text 'MemoryChg2Much' entered), a 'Remember username' checkbox, a 'Forgot your username?' link, 'Password' (with masked characters and a 'SHOW' button), and a 'Forgot your password?' link. A red 'Sign in' button is positioned below the form. At the bottom, there is a link 'Don't have an Advisor Manulife ID?' and a button 'Set up an Advisor Manulife ID' which is crossed out with a large red 'X'. On the right side, a box titled 'You will be able to access' lists features like 'Advisor Portal', 'Repsource', 'Group Retirement', 'Sell Health Plans', 'Investments advisor site', and 'Travel Insurance'. Below this, three sections provide links for users looking for different Manulife sites: 'Sign in to the other Manulife products', 'Manulife ID sign in' (for personal accounts), and 'Sponsor Manulife ID sign in' (for sponsors).

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After entering your Manulife ID and password, you may be asked to verify your Manulife User ID.

- 1 In this case, Manulife will need to send you a code. Select either your mobile number or email address listed on the screen and the system will send you a code.
- 2 You will receive a code by text or email. You will only have 15 minutes to enter this code.
- 3 Enter the code on the following screen.



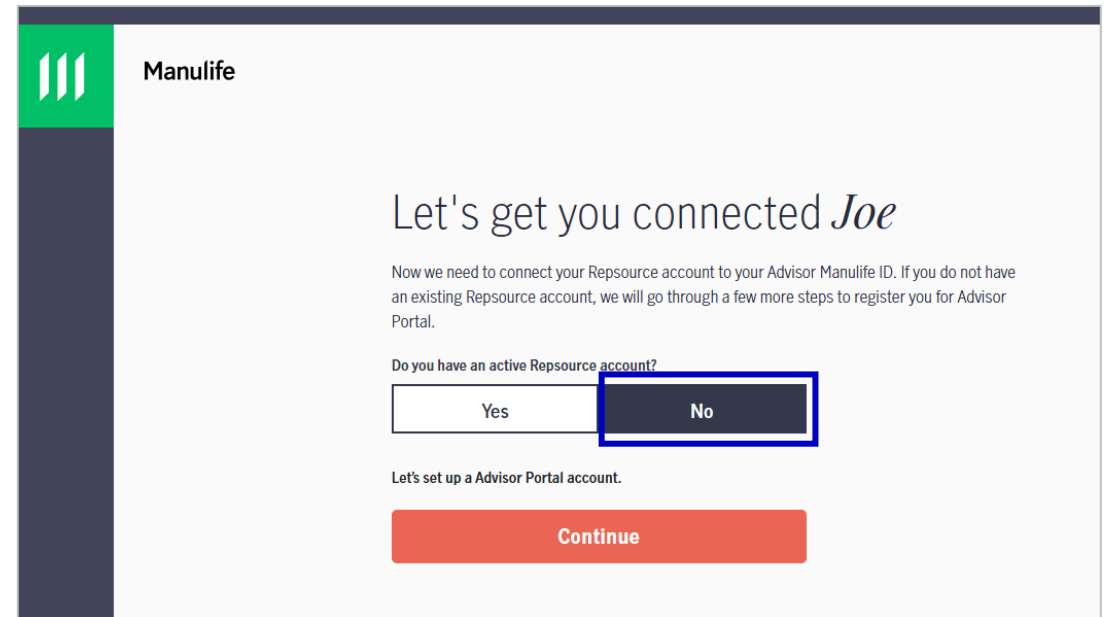
The image displays two screenshots of the Manulife user interface during the registration process. The top screenshot shows the 'Choose where you want the one-time code sent' screen. It includes a header with 'Personal', 'Sponsors', and 'Advisors' tabs, and a Manulife logo. The main heading is 'Choose where you want the one-time code sent'. Below this, there is a message: 'It looks like something's changed. And we want to keep your information safe. Before you can sign in, we need to make sure you're you. So we're going to send you a one-time code. You've got 15 minutes to enter the code in the next step. You've given us some ways to contact you. We've shown them below. Click on the one you want us to send the code to.' There are two options: 'Text it to +1 4**3****10' and 'Email it to j*****a@m*****.ca'. The bottom screenshot shows the 'Enter the code' screen. It has the same header and Manulife logo. The heading is 'Enter the code'. The message says: 'Okay! We emailed a one-time code to you at j*****a@m*****.ca. Remember, the code expires in 15 minutes.' There is a text input field for the code, with a placeholder 'Code' and a red error message 'You need to fill in a 6-digit code'. Below the input field is a link 'Get a new code if needed' and a red 'Continue' button. At the bottom, there is a link 'Try another way'. To the right of the screenshots is a sidebar with a key icon, the text 'Hi Joe,', and the code '255125'. It also includes a reminder: 'Remember, you've only got 15 minutes to use this code. Don't share this code with anyone else. And we'll never ask you for this code over the phone or by text. You didn't ask for a code? Go to manulife.ca to contact us right now. If you get this email but you didn't ask us to send you a code, it may be a sign that someone's trying to use your Advisor Manulife ID. Have a question? Don't reply to this message. Contact us for help.'

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Do you have an active Repsource account?

The next screen will ask if you have an active Repsource account.

Step 3: Select “No” and then click “Continue”.



The screenshot shows the Manulife registration interface. At the top left is the Manulife logo. The main heading is "Let's get you connected *Joe*". Below this is a paragraph explaining the need to connect a Repsource account to a Manulife ID. The question "Do you have an active Repsource account?" is followed by two buttons: "Yes" and "No". The "No" button is highlighted with a blue border. Below the buttons is the text "Let's set up a Advisor Portal account." and a large red "Continue" button.

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Legal agreement

Step 4: After reading the legal agreement, click the “I agree” box and then click “Continue”.

Legal agreement

Please carefully read this notice before you use this web site. If you do not agree with the following conditions, please exit the site. By registering for the use of the Advisor Portal, you are entering into a contract with Manulife and agreeing to the following:

- + Site Content
- + Confidentiality
- + Use of this Site
- + Security
- + Privacy
- + Trademarks
- + Governing Laws
- + Agreement with Manulife

☒ I agree to the terms and conditions

Continue

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Select your role

Step 5: When asked to select your role, click the “Get started” button on the **“Travel agent/broker”** tile.

The screenshot shows the Manulife registration interface. At the top, the Manulife logo and "Step 2 of 7" are visible. The main heading is "Select your role". Below this, there are six role selection tiles, each with a description and a "Get started" button. The tiles are:

- Advisor**: A licensed advisor who is contracted to sell Manulife products and services. (Crossed out with a large black X)
- Marketing assistant**: A support staff who has access to an advisor's business. (Crossed out with a large black X)
- Back office support staff**: An employee of a Financial Accounts or MGA firm who works in the back office. (Crossed out with a large black X)
- Group consultant**: An employee of a group consulting house who recommends Manulife Group products. (Crossed out with a large black X)
- Manulife employee**: A Manulife employee who works from Head Office or a Regional Sales Office. (Crossed out with a large black X)
- Travel agent/broker**: A travel agent or broker who only sells Manulife Travel Insurance. (Highlighted with a blue border and a red arrow pointing to the "Get started" button)

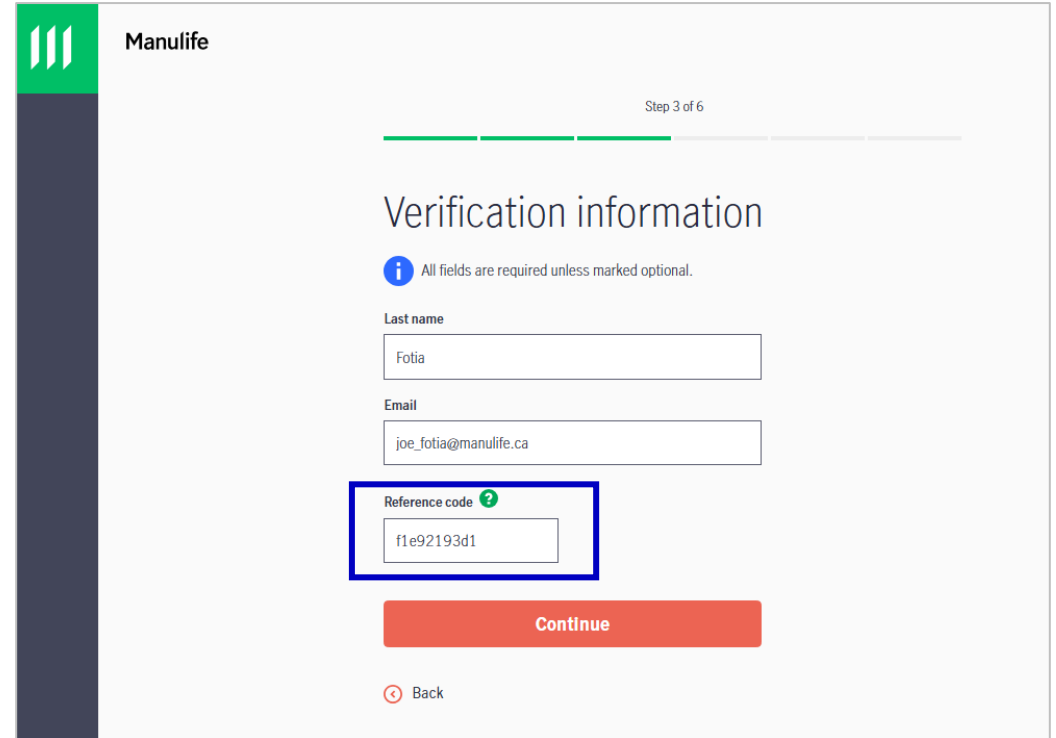
At the bottom left, there is a link: "Go to Advisor Portal home".

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Verification information

Step 6: On the “**Verification information**” screen, enter your **Reference code** and click “Continue”. The reference code will be sent to you the evening prior to your migration date. You must begin the process on or after your actual scheduled date. Not prior!

Reminder: The Reference code was/will be sent to you via email from noreply@manulife.ca with the subject line “Complete Your Registration”.



The screenshot shows the Manulife website's registration process at Step 3 of 6. The page is titled "Verification information" and includes a progress bar at the top. Below the title, there is an information icon and a note: "All fields are required unless marked optional." The form contains three input fields: "Last name" with the value "Fotia", "Email" with the value "joe_fotia@manulife.ca", and "Reference code" with the value "f1e92193d1". The "Reference code" field is highlighted with a blue border and a green question mark icon. Below the form, there is a red "Continue" button and a "Back" link with a left arrow icon.

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Contact details

Step 7: On the “Contact details” screen, enter all required information:

- First name (Same as in igoinsured)
- Last name (Same as in igoinsured)
- Office number (Can be any contact number)

Tip: Please be sure you verify your first and last names as they appear in igoinsured prior to migration. If unsure reach out to your igoinsured administrator.

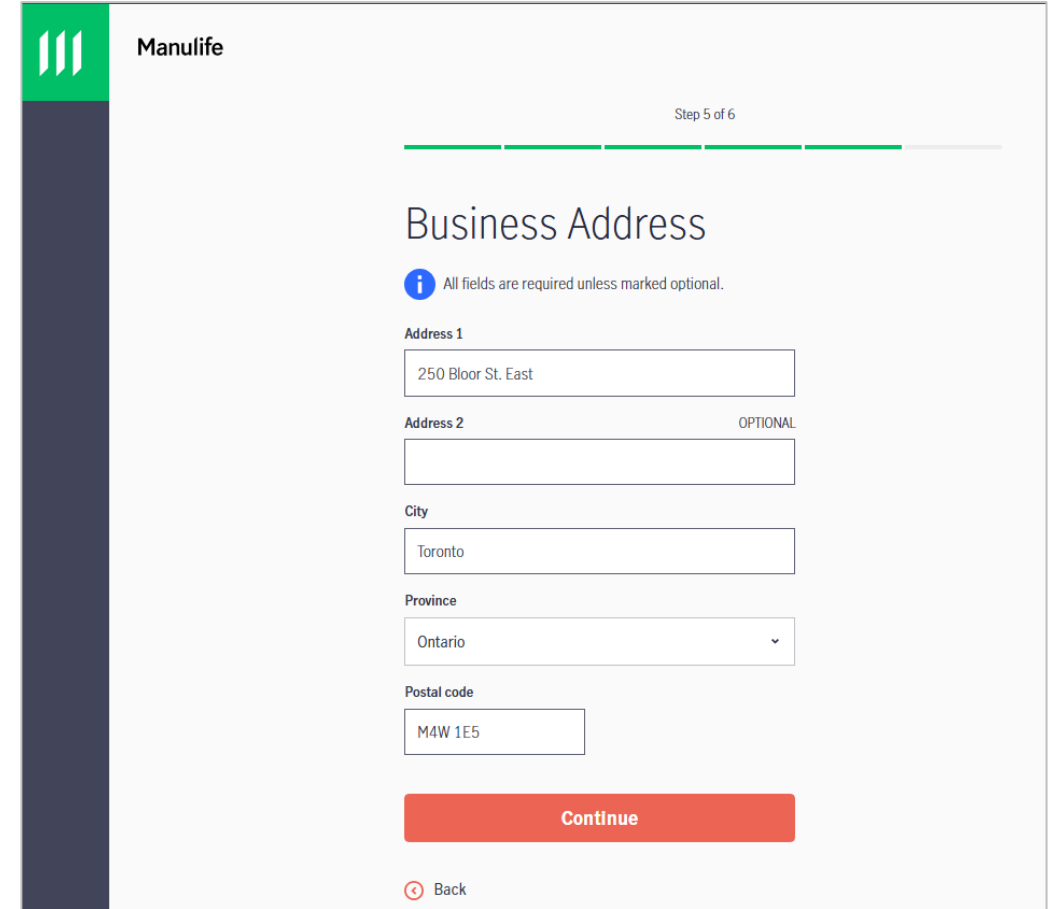
Then click “Continue”.

The screenshot shows the Manulife registration interface. At the top, the Manulife logo and 'Step 4 of 6' are visible. The title 'Contact details' is centered. Below it, an information icon states 'All fields are required unless marked optional.' The form contains several input fields: 'Preferred language' with a dropdown set to 'English'; 'Legal first name' with the value 'Joe'; 'Last name' with the value 'Fortino'; 'Preferred name' marked as 'OPTIONAL'; 'Office number' with the value '(416) 555-2332'; 'Extension' marked as 'OPTIONAL' with the value '000000'; and 'Mobile number' marked as 'OPTIONAL' with the value '000-000-0000'. A red 'Continue' button is positioned at the bottom right of the form area.

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Business Address

Step 8: On the “Business Address” screen, enter all required information and then click “Continue”.



The screenshot shows the Manulife Business Address registration screen. At the top, the Manulife logo is on the left, and the text "Step 5 of 6" is on the right. Below the logo is a dark vertical bar. The main content area has a light gray background. The title "Business Address" is centered. Below it is an information icon and the text "All fields are required unless marked optional." There are five input fields: "Address 1" (containing "250 Bloor St. East"), "Address 2" (marked "OPTIONAL"), "City" (containing "Toronto"), "Province" (a dropdown menu showing "Ontario"), and "Postal code" (containing "M4W 1E5"). At the bottom, there is a red "Continue" button and a "Back" link with a circular arrow icon.

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Review the details

Step 9: Review and verify your information.

If everything is correct, click “Submit”.

If you notice something incorrect, click “**Back to make changes**” button and make any necessary edits.

The screenshot shows the Manulife registration interface at Step 6 of 6. The page is titled "Review" and displays the following information:

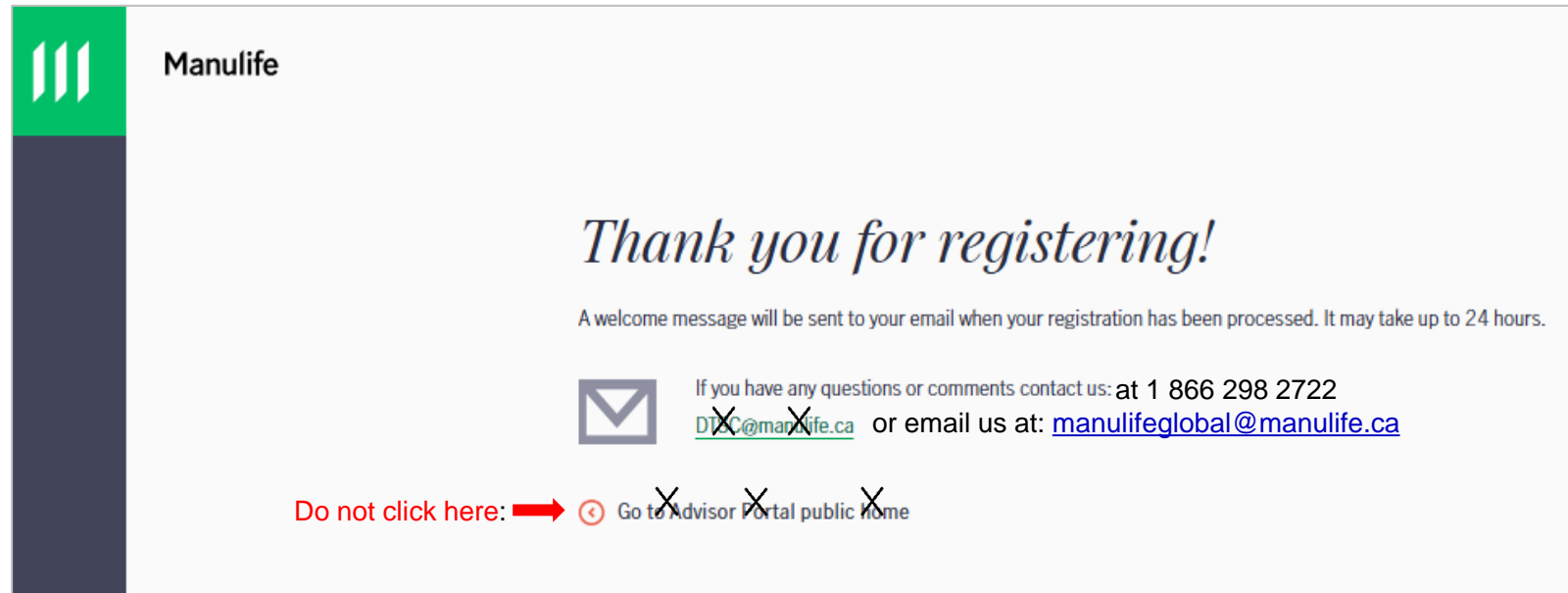
- Role:** Travel agent/broker
- Verification information:**
 - Email:** joe.jotia@manulife.ca
 - Reference code:** 11e92193d1
- Contact details:**
 - Preferred language:** English
 - Legal first name:** Joe
 - Last name:** Jotia
 - Preferred name:** N/A
 - Office number:** (437) 329-7110
 - Extension:** N/A
 - Mobile number:** N/A
- Business Address:**
 - Address 1:** 250 Bloor St. East
 - Address 2:** N/A
 - City:** Toronto
 - Province:** Ontario
 - Postal code:** M4W 1E5

At the bottom of the form, there is a link "Back to make changes" and a red "Submit" button.

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You're done!

Your registration is complete when the following screen appears.



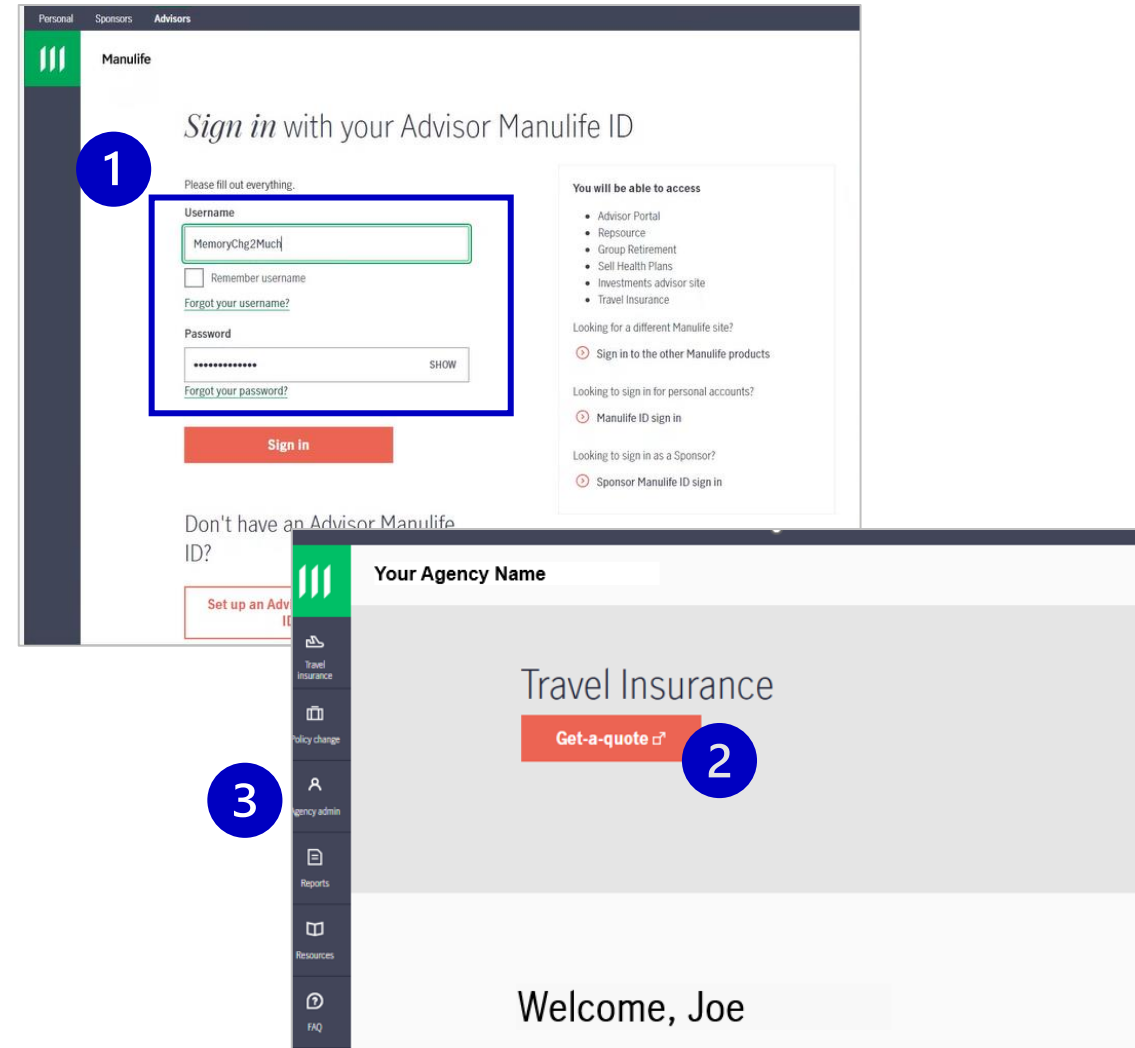
Signing in

Time to start selling!

Go to www.manulifetravel.ca

Tip: Save it to your favourites on your internet browser for easy access.

- 1 Sign in with your Manulife ID (username) and password & you're in!
- 2 Click on **Get-a-quote** to start selling.
Also, take some time to go through the different pages on the left navigation bar.
- 3



The image shows two overlapping screenshots of the Manulife website. The top screenshot is the sign-in page, titled "Sign in with your Advisor Manulife ID". It features a login form with fields for "Username" (containing "MemoryChg2Much") and "Password" (masked with dots). There are checkboxes for "Remember username" and "Remember password", and links for "Forgot your username?" and "Forgot your password?". A red "Sign in" button is at the bottom. To the right, a box lists "You will be able to access" various services like the Advisor Portal, Repsource, Group Retirement, Sell Health Plans, Investments advisor site, and Travel Insurance. Below the login form, there's a link for "Don't have an Advisor Manulife ID?" with a "Set up an Adv ID" button. The bottom screenshot shows the dashboard after login, with a header "Your Agency Name" and a large "Travel Insurance" section with a red "Get-a-quote" button. A left navigation bar contains icons for Travel Insurance, Policy change, Agency admin, Reports, Resources, and FAQ. The bottom of the dashboard says "Welcome, Joe".

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2

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