

Plan Member Statement

- Long Term Disability Claim
- Waiver of Premium Claim for:
 - Basic Life Benefit
 - AD&D Benefit

An incomplete form may result in delays in the adjudication of your disability claim.

Please see page 2 for instructions.

The LTD eligibility process

In assessing eligibility for LTD benefits, we gather information from you, your employer and your physician(s).

We ask you to provide information about what you are capable and incapable of doing, in relation to your job demands.

We ask your employer to tell us about your job demands.

We ask your physicians to provide us with information about your restrictions and limitations.

You are responsible for any fees your doctor charges for completion of the Attending Physician's Statement form and photocopies of file documentation.

All of the above information will be reviewed to determine whether you meet the eligibility criteria and that review cannot be completed until all of the information has been received. In some cases, it may be necessary to gather additional information before a decision can be made. We will notify you if this becomes necessary.

Instructions for this form

Please complete all sections of this form, sign and date it. You may give the completed form to your plan employer for submission or send it directly to the appropriate address below.

This form must be fully completed by the plan member and submitted no later than 6 weeks prior to the expiration of the Long Term Disability Qualifying period.

Authorization to attending physician

Please complete, sign and date the "Patient authorization" section at the top of page 3 of the Attending Physician's Statement form before you take it to your physician.

Our approach

Manulife Financial is committed to timely and effective return to work whenever possible. Should your claim for LTD benefits be accepted, we will review your situation and a representative of Manulife Financial will contact you to explore your current circumstances, and, if appropriate, develop a plan for your return to work.

Any questions?

Your plan employer is the best person to answer any questions you may have about your LTD benefit plan or the application process.

Prairie Teamsters Administration Services 155 - 7260 12 ST SE CALGARY AB T2H 2S5 Tel: (403) 252-6924

Fax: (403) 253-3231

OR Manulife Financial Group Benefits

Attention: Disability Claims PO BOX 4217 STN C CALGARY AB T2T 5N1 Tel: 1-877-481-9169 Fax: 1-866-635-3050



Group Benefits Plan Member Statement

Group Disability Claim

Additional information may be submitted on separate pages if there is insufficient space on this form.

1	Plan member information	Plan employer's name		Plan contr	act nur	mber	Division number					
	You can obtain your plan contract number and	SIN	Job ti	tle								
	division number from your benefit card.	Full name (last, first, initial)				○ Mr. ○ Miss	○ Ms. ○ Mrs.	Date	of birth (do	l/mmm/yyyy)		
		Street address (number, street a	Street address (number, street and apartment)									
		City				Pi	rovince		Postal cod	de		
		Phone number		Fax number		H	eight		Weigh	nt		
		Number of dependants and ages	Mail	ing address (if different fro	om above	;)						
2	Work information a) Last day worked?	(dd/mmm/yyyy)										
	b) Prior to stopping work had your job been modified?	○ Yes ○ No If yes, I	now w	ras it modified?								
	c) If your work was modified, why were you unable to continue working?											
	d) How long were you performing modified work?											
	e) Since work absence commenced:	Have you done any work for pay'	?	Dates (dd/mmm/yyyy) (from - to)	Describe	е						

3	Other activities information Since work absence	Have you returned to school/retraining? O Yes O No
	commenced:	
		Have you done volunteer activity? O Yes O No
4	Injury information	
	a) Is work absence due to an injury?	○ Yes ○ No If no, please go to section 6, Illness information.
	b) What kind of injury?	○ Motor vehicle accident ○ Work related ○ Other
	c) Describe how and when injury occurred.	
		Date of injury (dd/mmm/yyyy) Time of injury a.m. p.m.
	d) Is there any legal action involved?	Yes No If yes, please provide lawyer's name and address.
	(not required if claim is for waiver of premium benefit only)	Lawyer's name Lawyer's address (number, street and suite)
		Phone number
	e) Was the occurrence investigated by police? (not required if claim is for	Yes No If yes, please provide a copy of the police report.
	waiver of premium benefit only)	
5	Motor vehicle accident information	(not required if claim is for waiver of premium benefit only)
	a) If your work absence is	Your insurer's name Your insurance adjuster's name and phone number
	related to a motor vehicle accident, please provide the following information:	Your insurance policy number or claim number
6	Illness information	
	a) Have you ever had the same or a similar illness?	Yes No If yes, state when and describe. If no, go to section 7, Medical information.
	b) Did the illness result in an absence from work?	○ Yes ○ No If yes, state when.
		From (dd/mmm/yyyy) To (dd/mmm/yyyy)
	c) Describe your current condition, including how it prevents you from working.	

7 Medical information

- a) Please provide the following information about the family doctor who has your MEDICAL RECORDS.
- b) Please provide the following information about ANY OTHER SPECIALIST OR HEALTH CARE PRACTITIONER you have seen or are scheduled to see for this condition.

 (e.g. chiropractor, physiotherapist, psychologist, etc.)

Last name of doctor	First name of doctor	Approximately when did you first seek medical attention for this condition?	(dd/mmm/yyyy)
Address of doctor (nu	mber, street and suite)	Date of first visit (dd/mmm/yyyy)	Date of next visit (dd/mmm/yyyy)
City	Province	Frequency of visits	
Postal code	Telephone number	Type of practitioner	
Last name	First name	Approximately when did you first seek attention for this condition?	(dd/mmm/yyyy)
Address of doctor (nu	mber, street and suite)	Date of first visit (dd/mmm/yyyy)	Date of next visit (dd/mmm/yyyy)
City	Province	Frequency of visits	
Postal code	Telephone number	Type of practitioner	
Last name	First name	Approximately when did you first seek attention for this condition?	(dd/mmm/yyyy)
Address of doctor (nu	mber, street and suite)	Date of first visit (dd/mmm/yyyy)	Date of next visit (dd/mmm/yyyy)
City	Province	Frequency of visits	
Postal code	Telephone number	Type of practitioner	
Last name	First name	Approximately when did you first seek attention for this condition?	(dd/mmm/yyyy)
Address of doctor (nu	mber, street and suite)	Date of first visit (dd/mmm/yyyy)	Date of next visit (dd/mmm/yyyy)
City	Province	Frequency of visits	
Postal code	Telephone number	Type of practitioner	
Last name	First name	Approximately when did you first seek attention for this condition?	(dd/mmm/yyyy)
Address of doctor (nu	mber, street and suite)	Date of first visit (dd/mmm/yyyy)	Date of next visit (dd/mmm/yyyy)
City	Province	Frequency of visits	
Postal code	Telephone number	Type of practitioner	

8 Income/Benefit information

Have you received or are you receiving any of the following income/benefits?

If so, please provide copies of pay slips and/or award letters, including decline letters.

(not required if claim is for waiver of premium benefit only) Receipt of any benefits, including the following may result in a reduction to the benefit you receive from Manulife Financial and may require reimbursement to Manulife Financial of any benefit paid under this claim. It is imperative that you notify us of any change in the status of these benefits.

INCOME/	DATE OF	REFERENCE	CURRENT STATUS: (Check all that apply)								
BENEFIT	APPLICATION (dd/mmm/yyyy)	OR CLAIM NUMBER	PENDING?	AWARDED?	DECLINED?	TERMINATED?	APPEALED?				
QPP			\circ	\circ	\circ	0	\circ				
QPP/S.S.B.			0	0	0	0	0				
Workers' compensation*			0	0	0	0	0				
Other group insurance			0	0	0	0	0				
Association plan			0	0	0	0	0				
Motor vehicle insurance			0	0	0	0	0				
Salary continuation			0	0	0	0	0				
Any short term plan			0	0	0	0	0				
Employment insurance			0	0	0	0	0				
Old age security			0	0	0	0	0				
Retirement - government			0	0	0	0	0				
Retirement - employer			0	0	0	0	0				
Severance			0	0	0	0	0				
Veteran's allowance			0	0	0	0	0				
Social services			0	0	0	0	0				
Creditor's disability insurance			0	0	0	0	0				
Employment			0	0	0	0	0				
Any other Manulife plan			0	0	0	0	0				

^kIncludes any type of benefit for work related illness or injury including Workers' Compensation Board (WCB), Workplace Safety and Insurance Board (WSIB) and Commission de la santé et de la sécurité du travail (CSST).

9 Summary of education, training and experience

Please attach a copy of a current résumé, if available. Otherwise, please provide the following information.

a) Education

b) Work experience

Begin with most recent but include every job you have had in the last 15 years. If more space is required, please use additional sheets of paper.

SCHOOL	LOCATION	LEVEL OBTAINED	YEAR	AREAS OF STUDY
Elementary school/ High school				
College or university				
Other (Please include all forms of upgrading, in-service training, training on the job, special interest courses, etc.)				

DURATION OF	EMPLOYMENT		
FROM	ТО	EMPLOYER	JOB TITLE AND DUTIES

			_								
	c)	Acquired skills If not already mention in the education sect these may include ty operation of equipme supervisory skills, sp licenses or designation etc. Where appropriat give level, speed or proficiency.	ion, ping, ent, ecial ons,								
		iver's licence formation									
	a)	Does your job require to have a professional licence or designation Please explain.	al								
	h)	Do you have a valid		O Yes	○ No						
	u)	driver's licence?			O NO						
		a.ivoi o liootioo:		Class		Indica	ate any restr	ictions			
11	Ot	her interests									
		bbies and interests, luding any volunteer w	vork.								
12	W	ork capacity evalua	ation	extent tha	tion we are t you are no imary reaso	ow able to pe	nformation a erform each	bout your job du activity that you	ities and your ability or Ir job requires. If you h	ninability to do them. Please in ave indicated "UNABLE TO D	ndicate the O", please
	Α	ctivity	N/A	SELDOM (<1 hr.)	INFREQUENT (1 - 2 hrs.)	OCCASIONAL (2-4 hrs.)	FREQUENT (4-6 hrs.)	CONSTANT (> 6 hrs.)	UNABLE TO DO (Please explain)		
	S	itting		0	0			0	0		
	_	tanding	Ŏ	Ŏ	Ŏ	Ō	Ŏ	Ŏ	Ö		
	_	/alking	Ŏ	Ö	Ŏ	0	Ö	Ö	Ö		
	-	limbing	Ŏ	Ŏ	Ŏ	Ŏ	Ŏ	Ö	Ö		
		neeling	Ŏ	Ŏ	Ŏ	Ŏ	Ŏ	Ŏ	Ö		
	-	ending/Squatting	Ŏ	Ŏ	Ö	<u> </u>	<u> </u>	Ŏ	<u> </u>		
		rouching	Ŏ	Ŏ	Ŏ	<u> </u>	<u> </u>	<u> </u>			
		rawling	0		0						
	_	ushing	<u> </u>	0							
(A)	_	ulling		<u> </u>	<u> </u>		<u> </u>	<u> </u>			
ACTIVITIES	F	ine manipulation; fingers		<u> </u>	0						
_		imple grasping		-							
CT		ine manipulation	<u> </u>	0	<u> </u>		<u> </u>	<u> </u>			
		ine manipulation; hands		0	0						
₹ U	, , ,	epetitive body motions		0							
S	, '	riving		<u> </u>	<u> </u>		<u> </u>	<u> </u>			
PHYSICAL	B	eaching - above shoulder		<u> </u>	0						
	-	-		0							
	-	eaching - at shoulder level eaching - below shoulder	0	0	0	<u> </u>					
	_	-				0			0		
	_	eaching - side to side eaching - up and down	0	0	0	0	0	0	0		
	L	ifting / Carrying	N/A	0 - 10 lbs	11 - 20 lbs	21 - 50 lbs	> 50 lbs		FR	REQUENCY	
	_	fting - floor to waist		0	0	0		Infrequent	Frequent	Constant	
	\vdash	fting - waist to shoulder		0	0	<u> </u>		(Infrequent	Frequent	Constant	
	-						-				
	-	fting - above shoulder	0	0	0	0	0	Infrequent	Frequent	Constant	
	С	arrying	\cup	0	0	0		Infrequent	Frequent	Constant	

	Are you able to work in any of the	ne foll	owing con	ditions?	Yes	No		If "No", please explain
누	Exposure to marked changes in tempe	ratures	and humidit	у	0	0		
PHYSICAL	Being around moving machinery				0	0		
Ή	Unprotected heights				0	0		
	Exposure to dust, fumes and gases				0	0		
	Driving automobile equipment	<i>(</i> :						
	in this section we are gathering inforn the extent to which you are able to do	nation a it. If yo	about your j ou have indi	ob duties and cated "UNAB	your ability o LE TO DO", ¡	or inability to please provi	do tnem. F de primary i	or each activity that your job requires of you, please indicate reason.
								UNABLE TO DO
	A. Understanding and memory	N/A	SELDOM	INFREQUENT	OCCASIONAL	FREQUENT	CONSTANT	(Please explain)
	Remember locations and routine procedures	0	0	0	0	0	0	0
	Understand and remember short and simple instructions	0	0	0	0	0	0	\circ
	Understand and remember detailed instructions	0	0	\circ	\circ	0	0	0
	B. Sustained concentration and persistence	N/A	SELDOM	INFREQUENT	OCCASIONAL	FREQUENT	CONSTANT	UNABLE TO DO (Please explain)
	Carry out short and simple instructions	\circ	0	\circ	\circ	\circ	0	0
	Carry out detailed instructions	0	0	\circ	0	0	0	0
	Maintain attention and concentration for extended periods	0	0	0	0	0	0	0
	Perform activities within a schedule	\bigcirc	\circ	\circ	\circ	\circ	\circ	\circ
	Sustain an ordinary routine without supervision	\circ	\circ	\circ	\circ	0	\circ	0
	Make simple decisions	\bigcirc	\circ	\bigcirc	\bigcirc	\bigcirc	\circ	0
တ	Solve simple straightforward problems	\circ	0	\circ	\circ	0	0	0
Ħ	Solve complex problems	0	0	0	0	0	0	0
ACTIVITIES	C. Social interaction	N/A	SELDOM	INFREQUENT	OCCASIONAL	FREQUENT	CONSTANT	UNABLE TO DO (Please explain)
	Interact with the general public	0	0	\circ	0	0	0	0
9	Ask questions or request assistance	0	0	\circ	\circ	0	0	0
호	Accept instructions and feedback	0	0	0	\circ	\circ	0	0
SYCHOLOGICAL	Get along well with others without distracting them	0	0	0	0	0	0	0
2	Get along well with others without being distracted by them	0	0	0	0	0	0	0
	D. Adaptation	N/A	SELDOM	INFREQUENT	OCCASIONAL	FREQUENT	CONSTANT	UNABLE TO DO (Please explain)
	Respond to frequent changes in the environment or tasks	0	0	0	0	0	0	0
	Aware of normal hazards and take appropriate precautions	0	0	0	0	0	0	0
	Travel in unfamiliar places or use public transportation	\circ	0	0	0	0	0	0
	Set realistic goals or make plans independently of others	0	0	\circ	0	0	0	0
	Juggle tasks and prioritize	0	0	0	0	0	0	0
	E. Responsibility and accountal	oility				Yes	No	
	Is work pace without the pressure of deadlines?					\bigcirc	\bigcirc	
	Is work pace without the pressure of de	eadlines	s?					
	Is work pace without the pressure of de Does the work involve occasional pressure.			nes?		0	0	
	<u> </u>	sure to	meet deadlii			0	0	

13 Other information

Please provide any additional information that you believe should be considered in assessing your claim.

14 When to contact Manulife Financial

NOTIFY MANULIFE FINANCIAL PROMPTLY IN THE FOLLOWING CASES.

<u>I acknowledge</u> I must notify Manulife Financial immediately if:

- a) my medical condition improves, even though I have not yet returned to work,
- b) I start work either as an employee or a self-employed person,
- c) I apply for benefits under any workers' compensation law or plan as defined in section 8,
- d) I apply for benefits under Canada/Quebec Pension Plan,
- e) I receive any benefits or income from any other source,
- f) I am discharged from hospital if I am now hospitalized,
- g) I receive any other benefits/income related to my disability.
- h) I am leaving the country.

Plan member signature

15 Agreement, authorization and certification

<u>I certify</u> that the information in this form, and any further verbal or written statement provided by me in the future, is true and complete to the best of my knowledge. <u>I agree</u> that both my claim and my coverage may be denied or terminated as a result of my providing false, incomplete, or misleading information.

<u>I agree</u> to refund any monies that I may owe to Manulife Financial in accordance with the provisions of the group benefits plan with Manulife Financial, and <u>I authorize</u> Manulife Financial to deduct such monies from my group benefits.

Manulife Financial will investigate this claim and may require personal information about me, including information regarding my activities, income, employment, education and training, health, and medical history and treatment, including clinical notes.

<u>l authorize</u> any person or organization who has personal information about me, including any employer, group plan employer, health care professional, health care institution, pharmacy and any other medically-related facility, rehabilitation provider, insurer, administrators of government benefits or other benefit programs, the Medical Information Bureau and investigative agency, to release my personal information to Manulife Financial and/or its service providers for the purposes of group benefits plan administration, audit, and the assessment, investigation and management of my claim, including independent medical assessments.

<u>lauthorize</u> Manulife Financial, its reinsurers and its service providers to collect, to use, to maintain and to disclose to the persons or organizations listed above and/or each other any information needed for the purposes of group benefits plan administration, audit, and the assessment, investigation and management of my claim, including independent medical assessments.

<u>I authorize</u> the use of my Social Insurance Number (SIN) for the purposes of tax reporting. <u>I authorize</u> the use of my SIN for the purposes of identification and administration, if my SIN is used as my certificate number.

<u>I agree</u> that a photocopy or electronic version of this authorization shall be as valid as the original. <u>I understand</u> that information relating to Manulife Financial's Privacy Policy, which includes information on how and why Manulife Financial collects, uses, maintains and discloses my personal information, is available upon request; on Manulife Financial's website: www.manulife.ca/planmember, or through my employer.

<u>I understand</u> that any personal information provided to or collected by Manulife Financial in accordance with this authorization, will be kept in a group life, health, or disability benefits file. Access to my personal information will be limited to:

- Manulife Financial employees, representatives, reinsurers, and service providers in the performance of their jobs;
- · persons to whom I have granted access; and
- persons authorized by law.

<u>I have the right</u> to request access to the personal information in my file, and, where appropriate, to have any inaccurate information corrected.

Plan member signature

Date signed (dd/mmm/yyyy)

15	Agreement,
	authorization and
	certification
	(continued)

<u>I authorize</u> Manulife Financial and Prairie Teamsters Administration Ltd. to release to and/or exchange with each other, any personal information gathered through the claim adjudication and rehabilitation process including, but not limited to, my diagnosis, all medical information, consultation reports, independent medical reports, and hospital records and medically specific declination or termination letters, for the purposes of facilitating my return to work, and facilitating my understanding of Manulife Financial's claim decisions. <u>I understand</u> no information unrelated to my work restrictions will be transmitted to my employer.

Plan member signature	Date signed (dd/mmm/yyyy)