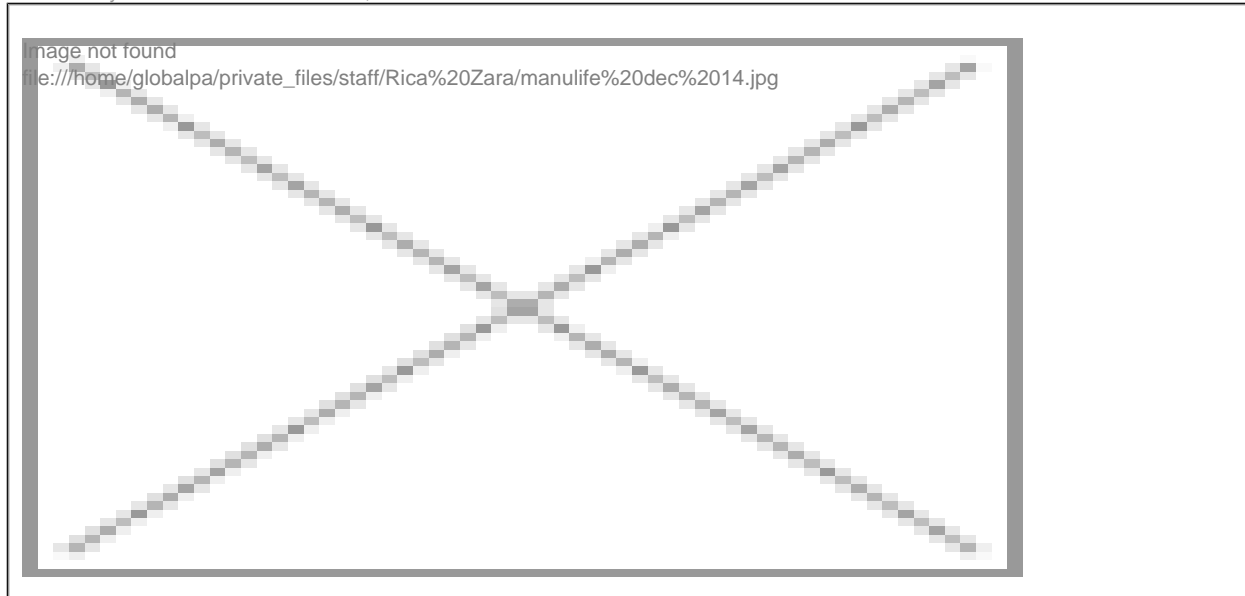




GLOBAL PACIFIC  
FINANCIAL SERVICES LTD.

## Manulife Investments / KYP Support Items

Submitted by Rica Zara on December 14, 2021 - 1:00am



As many of you are aware, the implementation date of KYP requirements is January 1, 2022 and we want to ensure that you are prepared.

**Please find a few support items to help you along as follows;**

- KYP Masterlist (please see attached).
  - Includes commentary around the product philosophy, people, process, price and performance.
- KYP Fund Packages
  - Includes fund profile, fund facts, characteristics sheet, performance returns, risk reward profile and sector exposure.
  - Currently available for AA portfolios, Dividend Income, Global Balanced, Global Equity, Global Thematic Opportunities, Monthly High Income, Strategic Income, World Investment Class, Yield Opportunities.
  - If you would like copies, please request them from us.
- [KYP fillable checklist](#)
- [Our three-step process](#)
- [Our KYP presentation](#)

[Please click here if you would like to book a quick phone call or virtual meeting!](#)

**Upcoming Marketing Call Schedule!**

Attachment	Size	Type
<a href="#">KYP Advisor Checklist.PDF</a>	59.23 KB	application/pdf
<a href="#">KYP Three Step Process.PDF</a>	68.73 KB	application/pdf

**Source URL:** <https://mail.globalpacific.com/bulletins/manulife-investments/2021-12-14/manulife-investments-kyp-support-items>