



# Plan Consultant (TPA) Website – User Manager Access Request

## TPA Website Access

- Complete sections 1, 2 and 3 of this form to set up the "user manager" for the TPA Firm listed below, i.e., the person(s) responsible for managing website access for individuals at the TPA Firm to the John Hancock Retirement Plan Services TPA website at [www.jhnpensions.com/tpadmin](http://www.jhnpensions.com/tpadmin) (in New York, [www.jhnypensions.com/tpadmin](http://www.jhnypensions.com/tpadmin)).

## User Manager Access

- The level of access assigned to a user manager on the TPA website includes the ability to control the access permissions of the other website users which are subject to the website privileges assigned to your firm by the trustee of each Plan to which your Firm serves as the TPA. With this access and control the user manager may:
  - Manage the access privileges on the website
  - Reset and unlock passwords for other users
  - Online email notification of changes made to other users' profiles and access by John Hancock Retirement Plan Services at the TPA Firm's request
  - Add or remove users
  - Suspend or reinstate user access
  - Manage phone and fax information for other TPA users
  - Access Notice Manager
- Once the form is properly completed and signed, send it to your John Hancock Retirement Plan Services client account representative. New users will receive an email with a temporary registration PIN and instructions to access the website.
- If you have any questions, please call our toll-free service line at 1-800-333-0963 and speak to your John Hancock Retirement Plan Services client account representative.

Fax the completed form to our toll free number 1-866-377-9577.

## 1. General Information

TPA Firm Name

Does John Hancock Retirement Plan Services hold the contract for your Firm's qualified retirement plan (Staff Plan)?

Yes  No If Yes, please indicate your contract number.

TPA Firm Identification Number

Contract Number (Staff Plan)

## 2. TPA Website User Manager(s)

Complete this section to provide secure website privileges to the person(s) who will be designated as the user manager(s) for the TPA Firm identified above. User manager(s) has access to all contract information with respect to all group annuity contracts for which your Firm is the designated TPA ("Clients' Contracts") and the ability to manage the profile of other users within your Firm. For additional access, check the applicable boxes below.

User Name (first and last)	Phone Numbers	Social Security Number 9 digit (numeric) unique identifier	Email Address	Staff plan access
1.	Business			<input type="checkbox"/>
	Fax			
2.	Business			<input type="checkbox"/>
	Fax			

### Delete the following user manager(s)

Name (first and last)

Name (first and last)

Name (first and last)

Name (first and last)

## 3. Authorization

I, the undersigned, an officer of the TPA Firm named above (the "Firm") and duly authorized to act on behalf of the Firm, hereby request that the website access specified above be made available to the users identified above. The undersigned represents that the Firm acts as third party administrator for the client plans associated with the Firm's TPA identification number and has proper authorization from each such plan to have access (including website access) to the information with respect to the group annuity contract issued to the plan by John Hancock Retirement Plan Services and to perform functions in connection with the administration of each such plan. On behalf of the Firm and each user manager listed above, the undersigned acknowledges that all contract information is confidential and agrees to safeguard and protect such information in accordance with the standards required by law and use such information only for authorized plan administration purposes. The undersigned, on behalf of the Firm, and each user manager listed above, agrees to maintain its website user name and password in its

safekeeping, and further agrees that the use of a valid user name and password by a designated user manager or any user, whether authorized or unauthorized, will be sufficient authority for John Hancock Retirement Plan Services to act or rely on information, instructions or requests provided by such user. John Hancock Retirement Plan Services is not responsible for any loss or damages to the Plan, the trustee(s), the Plan sponsor, participants or beneficiaries for relying and acting on such information, instructions or requests. On behalf of the Firm, the undersigned agrees to indemnify John Hancock Retirement Plan Services for any expense, damage, or investment loss incurred as a result of, or caused by, the use of the website access by such users, whether authorized or unauthorized, or from incorrect or erroneous information or data transmitted by any such users. The undersigned understands that this authorization can be revoked at any time by giving prior written notice to John Hancock Retirement Plan Services.

Signature of Authorized Officer of the Designated TPA Firm

Name - please print

Date

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Page 1 of 1