



Payroll Service Request

Use this form to select:

- The Payroll Path service, which enables your Payroll Company or a designated payroll integration agent, if applicable, to submit contribution instructions and other employee census information directly to John Hancock Life Insurance Company (U.S.A.) (or JHNY) ("John Hancock"), or
- The Payroll 360 service (including the Payroll Path service), under which John Hancock will transmit changes requested by your Plan's participants that affect payroll (new enrollments, changed deferral rate requests, and loan repayment amounts) directly to your Payroll Company or a designated payroll integration agent, if applicable.

Completed documents can be submitted on the website using the Submit a Document tool. For further assistance, contact your Client Account Representative.

1. General Information

The Trustee of

Contractholder Name

Plan ("the Plan")

Contract Number

2. Payroll Company

Payroll Company Name

Contact Name

Contact's Role

Contact's Business Email Address – must be a company's email address, unique to the individual

Contact's Telephone No.

3. Payroll Service

Speak with your John Hancock representative prior to completing this section.

The terms and conditions for Payroll Path and Payroll 360 are set forth below.

Payroll Path Only - Enables John Hancock to receive electronic contribution instructions and census information via secure file transfer protocol directly from your Payroll Company or a designated payroll integration agent, if applicable.

Payroll 360 (including Payroll Path) - John Hancock will accept new enrollments, deferral rate change requests and loan requests from participants, and then transmit the resulting payroll change information via secure file transfer protocol directly to your Payroll Company or a designated payroll integration agent, if applicable, in a weekly file (except as noted in the Terms and Conditions) on the day of the week selected below (the file will include all changes captured up to 11:59 PM ET of the prior day). Payroll 360 includes the features of Payroll Path.

Payroll Change File Transmission Day

Select the day of the week on which John Hancock will transmit the file containing payroll changes to your Payroll Vendor or designated payroll integration agent, if applicable:

Monday

Tuesday

Wednesday

Thursday

Friday

4. Terms and Conditions

I understand and agree to the following terms and conditions for Payroll Path and Payroll 360:

- a) Under Payroll Path, your Payroll Company or a designated payroll integration agent, if applicable, will provide certain contribution and employee census information (the "Information") to John Hancock in relation to the Contract. All information submitted to us by your Payroll Company or a designated payroll integration agent, if applicable, is available for review and should be reviewed by you

on the Plan Sponsor website. You are deemed to have approved a contribution file submitted by your Payroll Company or a designated payroll integration agent, if applicable, by making a payment (via the website or such other means agreed to by you and John Hancock) to fund the applicable contribution. The contributions will not be invested before approval has been provided by making a payment.

- b) You are solely responsible for ensuring that contributions are made in accordance with the terms of the Plan and are forwarded to John Hancock for allocation into the Contract at a frequency and within a timeframe that satisfies the requirements of the Employee Retirement Income Security Act ("ERISA"). Funds are not considered to be received by John Hancock until they are electronically deposited into John Hancock's bank account.
- c) John Hancock is authorized to rely on the Information and the instructions provided by the Plan Sponsor, Client Contact(s), or such other parties with authority to act in relation to the Payroll Path service. The Information may also be relied upon and used by John Hancock to update its records (except for changes relating to an employee's name or social security number).
- d) By default, the Trustee, Authorized Signor and Administrative Contact will receive **Payroll Path** online notifications. At least one individual at your company (except Payroll Administrator contact) must be set up to receive the online notifications. To customize how frequently you receive notifications (i.e., you can select to receive summary activity daily, weekly or monthly or an urgent email immediately), go to the Message Center on the Plan Sponsor website and change your email preferences.
- e) In order to select **Payroll 360**, you must first enable the Online Deferral Management, Online Enrollment and Participant Initiated Online Loans contract service features for the contract, and also the EZstart (Automatic Enrollment) service and/or the John Hancock Eligibility Calculation service, where appropriate. Contact your John Hancock representative to obtain the Contract Service Features Request form to enable these features. If it is necessary to update the Plan Document (PIF) to make these changes, John Hancock will contact your Third Party Administrator for evaluation and approval.
- f) If you select **Payroll 360**, you authorize John Hancock to transmit payroll change information related to newly enrolled participants, changed deferral rates for participants, loan repayment amounts, and any other information required by your Payroll Company or a designated payroll integration agent, if applicable, to implement payroll related changes. John Hancock will transmit a weekly file containing this information, except that deferral changes for contracts that permit changes on a monthly basis and deferral changes related to new enrollments prior to a participant's plan entry date may be transmitted on a monthly or other basis.
- g) Under **Payroll 360**, only deferral rate changes and/or new enrollments submitted via the John Hancock Participant website or the John Hancock Online Enrollment website will be transmitted by John Hancock to your Payroll Company or a designated payroll integration agent, if applicable. In addition, loans submitted via the John Hancock Participant website or via a paper form will also be transmitted provided that the paper form includes a repayment amount. You are responsible for updating your Payroll Company or a designated payroll integration agent, if applicable, with any deferral rate change requests submitted via paper form and any loans submitted via paper form that do not include a repayment amount.
- h) For **Payroll 360**, a payroll frequency (monthly, semi-monthly, bi-weekly or weekly) must be provided to John Hancock and shown on the Plan Sponsor website. If your company has multiple payroll frequencies, the frequency that covers the majority of your company's employees must be provided. For further assistance, contact your John Hancock Representative.
- i) Your designation of a Payroll Company (and, by extension, any agent such Payroll Company may further designate) does not give rise to any direct or indirect relationship between such parties and John Hancock. John Hancock is not responsible or liable for the acts or omissions of any such agents or other third parties.

5. Authorization and Signature

I, the undersigned, hereby direct and authorize John Hancock to implement the instructions specified in this form and agree that John Hancock is entitled to rely on the directions, authorizations and agreements contained in this form. I have reviewed, understand, and agree with the information, terms, and conditions provided on this form, including the Terms and Conditions, as well as the Terms and Conditions related to the other services indicated above that must be enabled in order to select Payroll 360. I agree that the instructions on this form will remain in effect unless and until written instruction to change or to terminate such instructions is received in good order by John Hancock.

I, on behalf of the Plan Sponsor, the Plan and its related trust, agree to indemnify and hold harmless John Hancock, its employees, agents and affiliates for any losses resulting from John Hancock acting on the instructions provided herein, John Hancock acting in reliance on the Information provided by your agent, Payroll Company or designated payroll integration agent, if applicable, or the actions or omissions of your agent, Payroll Company or designated payroll integration agent, if applicable.

Signature of Trustee or Authorized Named Fiduciary

Name - please print

Date