



How to Find What You Need for Your John Hancock Annuity Contract

We know your time is valuable and we want to be able to help you the first time you contact us. Please view the chart to determine the best way for you to resolve your inquiry in a timely and secure manner.

Inquiry	Complete Online (register or log in to account)	Complete by Form (visit the Forms tab)	Complete by Online Form (visit the Forms tab and click on the green “Submit Online” button)	Complete by Phone (call 1-800-344-1029)
Address Change	Yes	Yes	Yes	Yes
Annuitant Change	No	Yes	No	No
Annuitization Quote Request	No	No	No	Yes
Annuitized Verification of Income Request	No	Yes	No	Yes
Auto Investment Program Stop/Change	No	No	No	Yes
Automatic Rebalancing Request	No	Yes	No	Yes
Banking Instructions Change*	No	Yes	No	No
Beneficiary Change	Yes	Yes	Yes	No
Cashed Check Copy Request	No	No	No	Yes
Check Void/Stop	No	No	No	Yes
Death Claim***	Yes (if beneficiary an individual)	Yes	No	No
Death Report***	Yes	Yes	No	Yes
Dollar Cost Averaging Request	No	Yes	No	Yes
Dollar Cost Averaging Stop/Change	No	No	No	Yes
Earnings Sweep Request	Yes (withdrawal request)	Yes	No	Yes
Fraud Report	No	No	No	Yes
Full Surrender Request**	Yes (up to \$100,000)	Yes	No	Yes (up to \$100,000, if authorization on file)
Investment Fact Sheets Request	Yes	No	No	Yes
Investments Change	Yes	Yes	No	Yes (if authorization on file)
Letter Request	No	No	No	Yes

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Maturity Date Extension	Yes	Yes	Yes	Yes
Name Change	No	Yes	Yes	No
Ownership Change*	No	Yes	No	No
Portfolio Performance Report Request	Yes	No	No	Yes
Required Minimum Distribution (RMD) Amount Request	Yes	No	No	Yes
Statement Request/Print	Yes	No	No	Yes
Systematic Programs Enrollment (Required Minimum Distribution, Systematic Withdrawal, Income Made Easy)**	Yes	Yes	Yes	Yes
Systematic Programs Stop (Required Minimum Distribution, Systematic Withdrawal, Income Made Easy)	No	Yes	No	Yes
Systematics Program Change**	Yes	Yes	No	Yes
Tax Cost Basis (Non-Qualified Contracts) Review	Yes (view only)	No	No	Yes
Tax Form Correction Request	No	No	No	Yes
Tax Forms (1099/5498) Copy Request	No	No	No	Yes
Tax Withholding Change (Federal)	Yes	Yes	No	Yes
Tax Withholding Change (State)	Yes	Yes	No	Yes
Telephone Withdrawal Authorization (TWA) Enrollment*	No	Yes	Yes	No
Transfer In Request	No	Yes	No	No
Transfer Out Request	No	Yes	No	No
Website Registration Update	Yes	No	No	No
Withdrawal Request**	Yes	Yes	No	Yes (up to \$100,000, if authorization on file)

*Medallion Signature Guarantee (MSG) required. MSGs are an added security measure and may be obtained at most banks, financial institutions, or credit unions.

**MSG may be required when completing a form depending on what is being updated. Please refer to the form for instructions.

***Report a death and submit a claim without registering or logging in by visiting the Claim Center.

For any questions, please call 1-800-344-1029 Monday through Friday, 8 a.m.– 6 p.m. Eastern Time.



John Hancock Life Insurance Company (U.S.A.) ■ 197 Clarendon Street ■ Boston, MA 02116 ■ 1-800-344-1029 ■ www.jhannuities.com

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