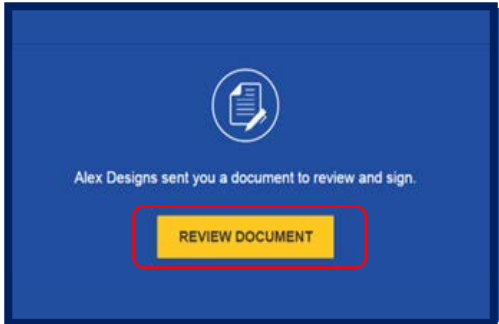# DocuSign- How to e-Sign using DocuSign

! **DocuSign** is an advisor purchased eSignature capability tool that allows you to sign any documents with you and your clients. This guide is intended as a high-level overview only. For more information please visit [DocuSign](#) webpage.

1

Review the DocuSign email: Open the email and review the message from the sender. Click **REVIEW DOCUMENT** to begin the signing process.

2

- **Agree to sign electronically:** Review the consumer disclosure, and select the checkbox I agree to use Electronic Records and Signatures.
- Click **CONTINUE** to begin the signing process.

! **Important!** To view and sign the documents, you must agree to conduct business electronically. Note: To view additional options, click **OTHER ACTIONS**.

3

- **Start the signing process:** Click the **START** tag on the left to begin the signing process. You are taken to the first tag requiring your action.
- Click the **SIGN** tag.

4

Adopt Your Signature

Confirm your name, initials, and signature.

Full Name
Michael P   **A**

Initials
MP

Select Style   Draw

Preview   **B**

DocuSigned by:
Michael P
02367A3E9D33485...

DS
MP

Change Style

By clicking Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

C

ADOPT AND SIGN   CANCEL

A **Verify your name:** Verify that your name and initials are correct. If not, change them as needed.

B Adopt a signature

C Click **ADOPT AND SIGN** to adopt and save your signature information and return to the document.

5

- **Confirm signing:** When you finish clicking all signature tags in the document, confirm signing by clicking **FINISH**.
- A message appears stating that you have completed your document. You can now download a PDF copy or print a copy of the document.
- The sender receives an email with the signed document attached, and the signed document appears in their DocuSign account.