

THE ESIGNATURE PROCESS: AN OVERVIEW

Welcome to the eSignature process. This overview will walk you through the simple steps of e-signing your documents.

Note: You can complete eSignatures in the latest versions of Google Chrome or Mozilla Firefox, as well as version 10.x or higher of Microsoft Internet Explorer.

WELCOME

You must agree to the terms of the Electronic Record & Signature Consent Disclosure before you can move forward with the eSignature process. If you don't agree to the terms, click **Decline Signature** to end the eSignature process, which will notify our firm that you declined the signature request.

VERIFY IDENTITY

For all documents, we'll require you to identify yourself through information our firm already knows about you. Certain IRS-regulated documents also require additional identity verification before you can sign. If extra security questions are required, you'll have five minutes to answer a series of questions about yourself. If you don't answer the questions within five minutes, or if you're unable to answer the questions correctly, the documents will become invalid and the eSignature process will end. Our firm will be notified that the documents are no longer valid.

REVIEW

During this step, you must review each document. You cannot proceed with the eSignature process until you mark the **I have reviewed the requested documents** checkbox.

If you find an issue, click the **Click here to decline the signature request** link to open a dialog through which you can end the eSignature process. Our firm will be notified that you declined the request.

SIGN

In this step, you'll create your signature and the other information required to sign your documents. Note that your signature must include your full name.

You can type your signature and choose a style, or you can draw your signature using your finger (mobile device) or mouse (computer).

SUBMIT

You must review the documents and mark the **I have reviewed all documents and am satisfied with the signed copies** checkbox before you can submit them. After you submit the documents, we recommend that you download them for your records.

If you find an issue, select the **Click here to decline the signature request** link to open a dialog through which you can end the eSignature process. Our firm will be notified that you declined the request.

See eSignature Demo