

Why eSignature?

A MORE CONVENIENT, SECURE AND FASTER WAY OF RECEIVING AN INVESTOR'S SIGNATURE ON REQUIRED DOCUMENTS.

WHAT IS ESIGNATURE?

Electronic signature (eSignature) allows investors to sign forms electronically, eliminating the need to print and sign forms manually. An electronic signature is intended to provide a secure and accurate identification method for a document, and provides the same legal standing as a handwritten signature. You can utilize eSignature with the following NetX360 applications:

- **Client Onboarding:** New account opening paperwork and account funding forms
- **Subscribe:** Annuity order paperwork
- **Managed Account Solutions' Proposal System:** Investment proposal
- **Corestone®:** Electronic only accounts

ESIGNATURE VIDEOS

- [Demonstration: How to Utilize eSignature within NetX360](#)
- [Getting Your Documents Signed Faster with eSignature \(SIGNiX\)](#)
- [Getting Your Documents Signed Faster with eSignature \(DocuSign\)](#)
- [eSignature for Client Onboarding](#)
- [eSignature for Subscribe](#)
- [eSignature for Corestone®](#)

WHAT CAN ESIGNATURE OFFER?

Save time and energy when onboarding clients by streamlining the process with Pershing's integrated eSignature solutions. With this feature, data can be pre-populated from your NetX360® account, source systems, or your own CRM with a digital signature. Pershing also accepts eSignature for almost any type of document, so advisors and investors can digitally complete maintenance tasks from anywhere they have a computer or mobile device.

Three features that can be a part of the eSignature process allows you to track advisor attestation, capture additional levels of new account approval and the storage of Pershing-required paperwork.

Our customizable Document Management and Workflows tool creates efficiency by allowing home office staff and advisors to store documents electronically. Through NetX360's Document Center, advisors can share imaged documents with investors who use NetXInvestor®.

HOW TO GET STARTED?

You have the choice to enter into a contract with a Pershing approved eSignature provider or choose to work with SIGNiX via Pershing's contract. For clients who have an existing relationship with DocuSign, Pershing has integrated its client onboarding with DocuSign. All non-approved eSignature vendors or a proprietary technology solution will require Pershing approval before documents are accepted.

Using a provider with an integrated solution allows you to implement eSignature quickly, with easy configuration. Pershing's approved eSignature providers include:

- **SIGNiX** (integrated)
- **DocuSign** (integrated)
- **Adobe Sign** (formerly EcoSign)
- **OneSpan Sign** (formerly eSign Live)
- **Agreement Express**

For more information about Pershing's eSignature solutions and to sign-up, contact your relationship or account manager.

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