How to use eSignature to sign documents

eSignature is Raymond James' solution for easily and securely obtaining electronic signatures on eligible Raymond James forms while ensuring the identity of the signing parties. Raymond James has partnered with DocuSign to provide this safe and secure online document-management service.

This guide will walk you through the signing process:

eSignature: Signing Documents

To begin the process of electronically signing documents, you'll need access to your email and text messaging on your mobile phone.

Step 1 – Open the email

First, you will receive an email from your DocuSign alerting you that a document is awaiting your signature.

In the email, click **View Documents** to launch a browser window.
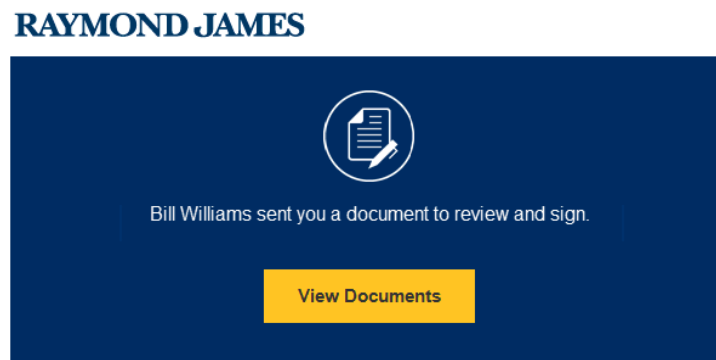
In the browser window that opens:

1. Verify that the phone number shown for you is correct. (If not, contact the sender.)
2. With your phone number verified, click **Send SMS** to send a text message to the phone number listed.

Step 2 – View Text Message

On your mobile phone, view the text message and retrieve the access code from the body of the text message.

Important: Don't share your access code. This code prevents unauthorized access to documents being presented for eSignature and is also used to identify you as an authorized signer of the document.

Step 3 – Enter the Access Code

Return to the browser window and enter the access code provided in the text message. Click **Confirm Code** to complete authentication. (You have three attempts to enter the access code correctly.)

Step 4 – Review and Sign Documents

In the browser window:

1. You will be requested to review the Consumer Disclosure and select the check box next to "I agree to use electronic records and signatures." Your acceptance activates the **Continue** button.

2. Click the **Continue** button to proceed.

3. Click **Start** to begin the signing process and review the content of your document. You'll be guided through the process with yellow arrows instructing you on the action to take throughout the document.

   Note: If you do discover missing or inaccurate information, please contact the sender.

4. When you click the first **Sign** or **Initial** tag in the document, you are asked to adopt your signature.

   Note: If you have previously signed documents via DocuSign and have established a DocuSign account, you may not see the Adopt Your Signature window and will use your previously adopted signature style.

To adopt your signature:

- o Choose whether you want to select a preformatted signature style or to draw your signature.

  If you choose to use a preformatted style, you can click **Change Style** to view and select a signature style.

  If you choose to draw your signature, click **Draw** and in the blocks provided, draw your signature and initials using a mouse or, for a touchscreen, your finger or a stylus. If you make a mistake, click **Clear** to reset the block. (You can return to the preformatted signature styles by clicking **Select Style**).

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- o Click **Adopt and Sign** to adopt and save your signature information and return to the document.

Step 5 – Finish

After you are done signing the document, click the **Finish** button.

You have successfully signed your document. Once all parties have signed the document, including other related parties and Raymond James representatives, you will be notified via e-mail. At that point, you will have an opportunity to view, download, and print the completed document.

When you're ready, click the **Continue** button to exit the electronic signing.