



ADOBE SIGN



The Client Experience

Overview

The electronic signature process provides an easy way to review and sign documents from anywhere. This guide will show you how to sign LPL Adobe Sign envelopes, from receiving the documents by email to completion.

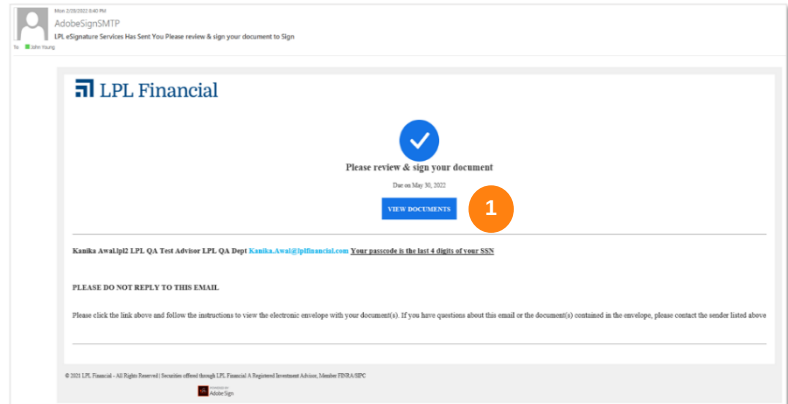
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The Client Email

1. An email will be sent automatically once the advisor submits the request. Within the email select **View Documents** to open them in a web browser.

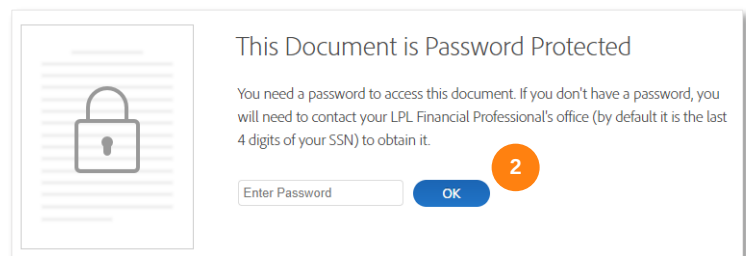
Note: If there is a secondary signature required, they will receive a separate email after the first signature is submitted.



Accessing the Document

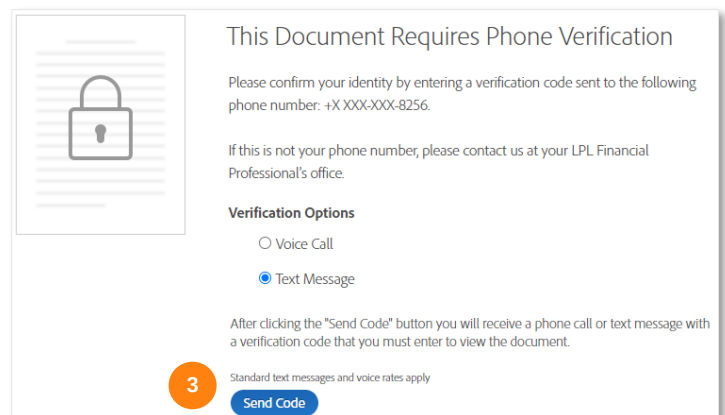
2. Enter the **last 4 digits** of your social security number as the password. Select **OK**.

Note: Recipients have 5 attempts at entering this password (4-digit passcode) correctly. If validation fails, the entire envelope will be cancelled and your financial professional will need to resend it. If your password is incorrect, contact your financial professional to update and resend.

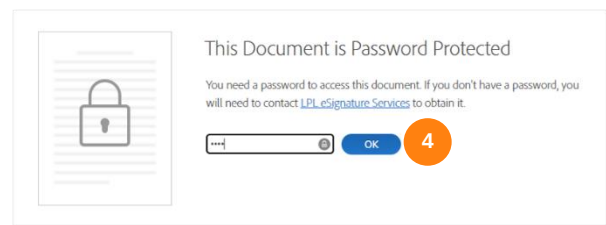


3. If phone verification is needed, select the preferred method to receive the code and select, **"Send Code."**

- The phone number used will be the one listed in ClientWorks.
- If the phone number is incorrect, contact your financial professional to update the account and resend the documents.



- Enter the six-digit code in the required field and select **OK**.



Signing the Document – Desktop

- The document will now be available to review and sign. Once ready to sign, select the yellow **Next** arrow to be directed to the signature field.
- Select the highlighted field that says **Click here to sign**.

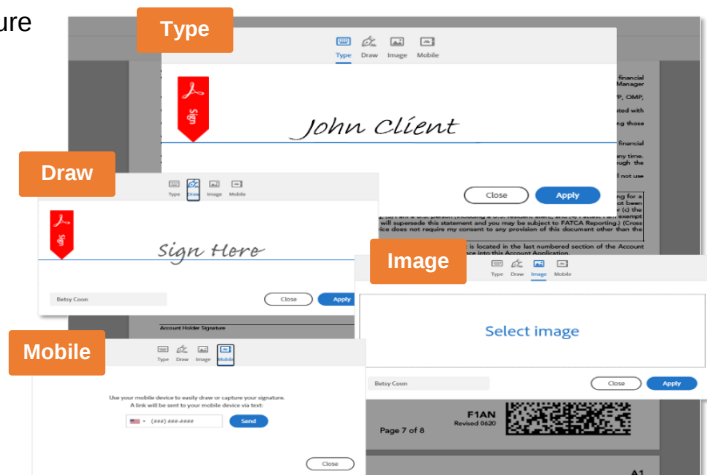
- Select the preferred method to add a signature and select **Apply**

Type: type the signature on the keyboard.

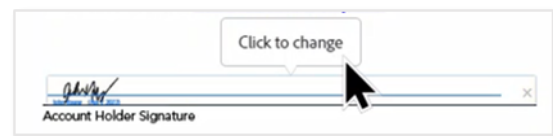
Draw: draw the signature with a mouse, stylus, or finger.

Image: upload an existing image of your signature.

Mobile: a link is sent to the client's mobile phone to sign remotely. See below for the [mobile signing experience](#).

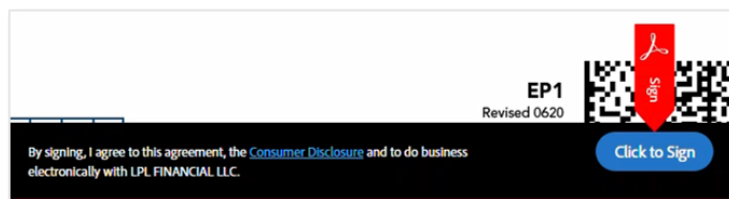


- The signature in the selected format appears on the signature line. To change the signature, click on the signature.



- The **Next** arrow appears if there are additional signatures required on the document. Click to add additional signatures where applicable.

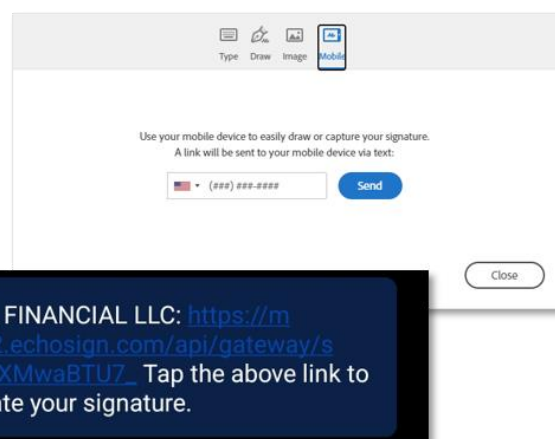
10. After all signatures are added click the **Click to Sign** button to submit the document.



11. A confirmation screen will identify next steps after signing. The document can be downloaded from here as well.

The Mobile Signing Experience

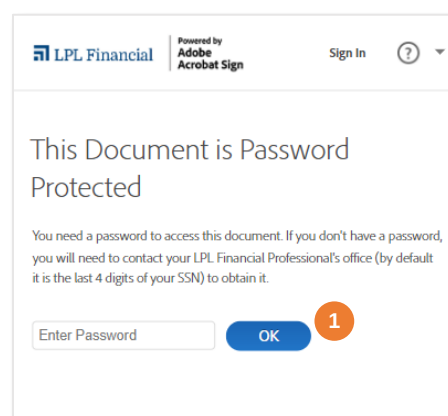
1. Enter the phone number of the recipient. That number will receive a text with a link to access the documents on a mobile device.



2. After selecting the link, review and sign the document using the Draw or Image option.

Signing the Document – Mobile

1. Enter your password or perform phone verification to access the document.
 - Select the Password box to open your keyboard.



2. Review the document, then scroll down to the **Signature** section or select the blue arrow to continue.
3. Tap the highlighted field to continue the signature process.

LPL Financial | Powered by Adobe Acrobat Sign

1 required field remaining

Description of Service

By enrolling in this electronic delivery service, you agree to receive announcements by email about shareholder communications material. These materials are made available electronically by issuing corporations, mutual funds and other third parties. Quarterly and annual reports, proxy statements, and resolutions are examples of shareholder communications that may be made available electronically. The announcements will include the Internet address (URL) where the materials can be found. Materials referenced within the email announcement may be viewed electronically via the Internet and printed with a local printer. If the materials are not made available electronically, you will receive the standard printed materials and no announcement will be made by email. Your enrollment will be effective for all holdings in the specified account on an ongoing basis unless you change or cancel your enrollment.

If you have a security position in an equity or mutual fund as of the record date for a particular shareholder distribution and the materials to be distributed are made available electronically, you will receive an email announcement. The content of the information provided for electronic delivery is the responsibility of the issuing corporation, mutual fund, or third party, presenting it. LPL is not responsible for content of electronic shareholder material. Please note that not all issuers participate in electronic delivery of materials. If the materials are not able to be electronically delivered due to issuer participation you will receive the information via regular mail to your address on file.

Failure of Email Address

If, during a distribution, your email address proves to be invalid, your enrollment in this electronic delivery service will be cancelled and you will receive a hard-copy notification of the announcement. This notification will provide the URL to the electronic material, and will contain instructions to visit <http://www.investordelivery.com> to re-enroll.

Hardware and Software Required to Use Service

Enrollment in this electronic delivery service requires that you have a personal computer with appropriate browser software, such as Microsoft Internet Explorer®, Google Chrome®, or equivalent, and email software as well as communications access to the Internet. This access may incur charges from Internet Service Providers and local telephone companies. LPL, the issuing corporation or mutual fund will not be responsible for the costs associated with electronic access; these costs are the responsibility of the shareholder. Should you wish to print materials that have been delivered electronically, you must have a printer as well. Some issuers electronically publish their materials in Portable Document Format (PDF). In order to view PDF-formatted documents, you must have Adobe Acrobat Reader software.

4. Account Holder Signature

By signing below, I represent that I have reviewed, understood and agree to the Account Holder Consents above. I also understand that by choosing to enroll in the electronic delivery for Shareholder communication, I am agreeing to the Broadridge Privacy Policy and the Broadridge Terms and Conditions, which are located at www.investordelivery.com.

YOUNG CART	Account Holder Name (print)	Apr 14, 2022
	Date	
YOUNGTWO CART	Account Holder Name (print)	Date
	Date	
	Account Holder Name (print)	Date
	Date	
	Account Holder Name (print)	Date
	Date	

4. Select **Type**, **Draw** or **Image** to continue the signature process.

- Use your virtual keyboard to type your signature or select draw to virtually sign the document. You can also utilize the image to use a signature saved on your device.

5. Select **Apply** to continue.

4 Type Draw Image

Sign

John Young

Clear

Close Apply

5

6. Continue signing all applicable areas, tapping the blue-highlighted fields to apply your signature.
7. Select **Finish**, after all fields are completed.

Required fields completed 7 Finish

Description of Service
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4. Account Holder Consent
By signing, I agree to this agreement, the [Consumer Disclosure](#) and to do business electronically with LPL FINANCIAL LLC.

Tap to change

	YOUNG CART	Apr 14, 2022
Account Holder Signature	Account Holder Name (print)	Date
	YOUNGTWO CART	
Account Holder Signature	Account Holder Name (print)	Date
	YOUNGTWO CART	
Account Holder Signature	Account Holder Name (print)	Date
	YOUNGTWO CART	
Account Holder Signature	Account Holder Name (print)	Date

8. Select **Tap to sign** to complete the process.

Required fields completed 8

By signing, I agree to this agreement, the [Consumer Disclosure](#) and to do business electronically with LPL FINANCIAL LLC.

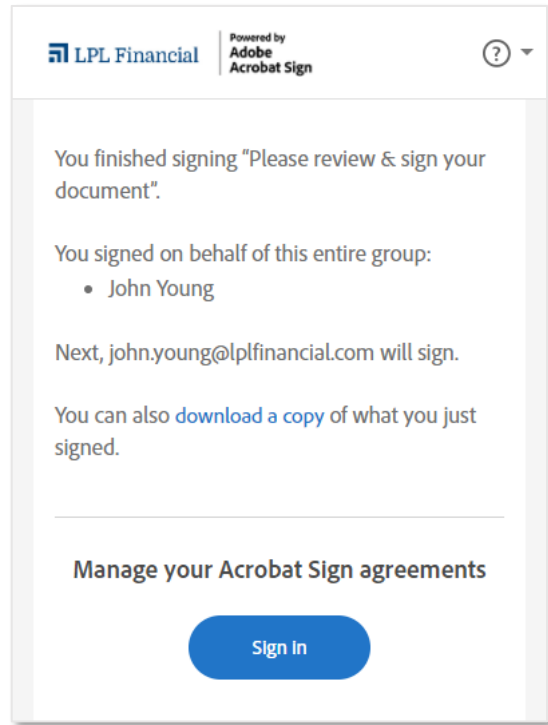
Cancel Tap to sign

Need more a printer or web? Some issuers electronically publish their materials in Portable Document Format (PDF). In order to view PDF-formatted documents, you must have Adobe Acrobat Reader software.

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Account Holder Signature	Account Holder Name (print)	Date
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Account Holder Signature	Account Holder Name (print)	Date
	YOUNGTWO CART	
Account Holder Signature	Account Holder Name (print)	Date

9. Confirmation message will appear.



Viewing Signed Documents

After all signers have completed the process, each individual will receive an email confirmation with a link to view the documents. Click **View Documents** to create an Adobe Sign account, or log into an existing one and view the signed form(s).

For details on creating an Adobe Sign account, click [here](#).

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Not Insured by FDIC/NCUA or Any Other Government Agency | Not Bank/Credit Union Guaranteed | Not Bank/Credit Union Deposits or Obligations | May Lose Value