# ADOBE SIGN

## The Client Experience

## Overview

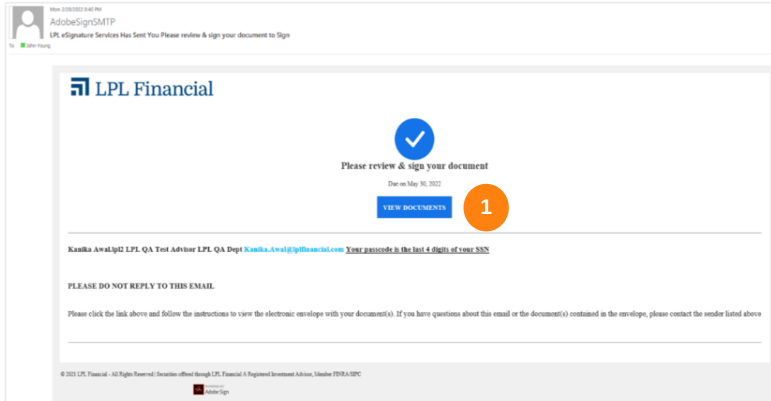
The electronic signature process provides an easy way to review and sign documents from anywhere. This guide will show you how to sign LPL Adobe Sign envelopes, from receiving the documents by email to completion.

## Contents

## 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.

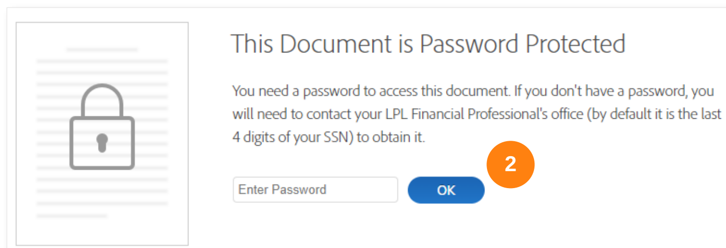
   **Note:** If there is a secondary signature required, they will receive a separate email after the first signature is submitted.




## Accessing the Document

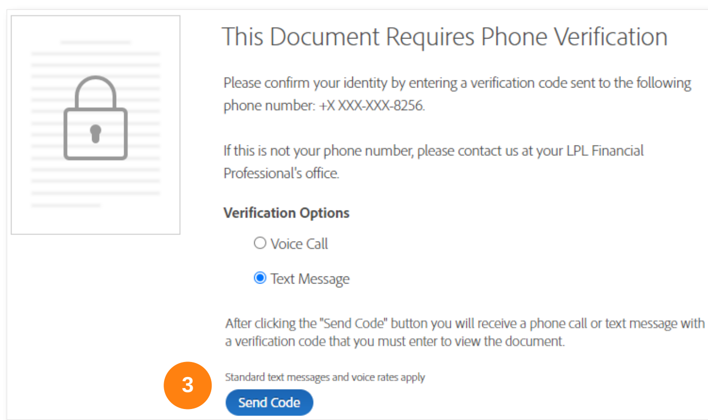
2. Enter the **last 4 digits** of your social security number as the password. Select **OK**.

   **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.

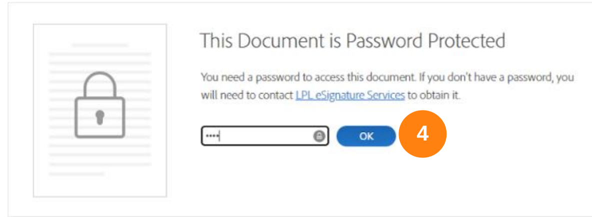



3. If phone verification is needed, select the preferred method to receive the code and select, "**Send Code**."

   - 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.



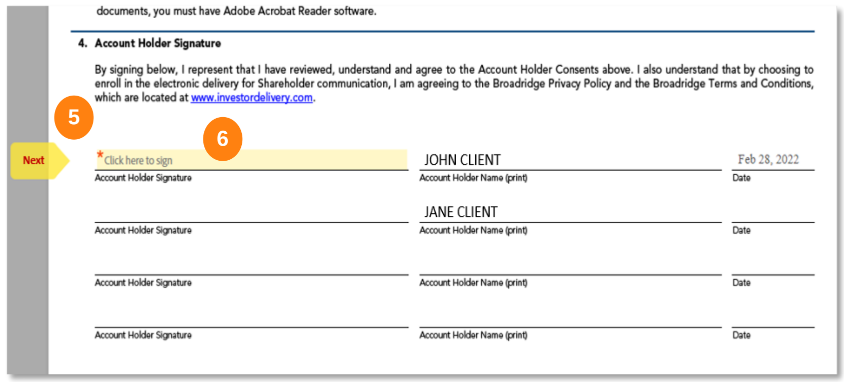
4. Enter the six-digit code in the required field and select **OK**.




## Signing the Document – Desktop

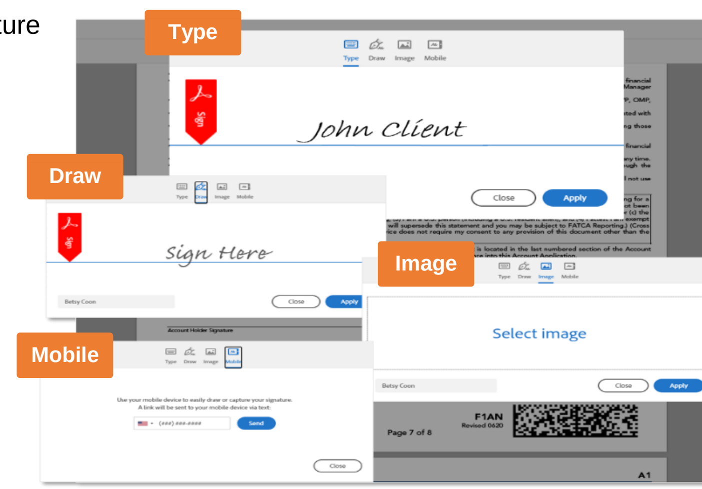
5. The document will now be available to review and sign. Once ready to sign, select the yellow **Next** arrow to be directed to the signature field.

6. Select the highlighted field that says **Click here to sign**.




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

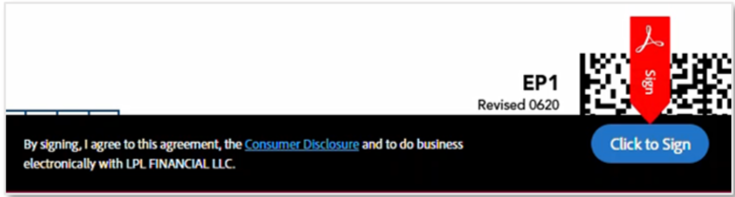
   **Type:** type the signature on the keyboard.
   **Draw:** draw the signature with a mouse, stylus, or finger.
   **Image:** upload an existing image of your signature.
   **Mobile:** a link is sent to the client's mobile phone to sign remotely. See below for the [mobile signing experience](mobile signing experience).




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


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

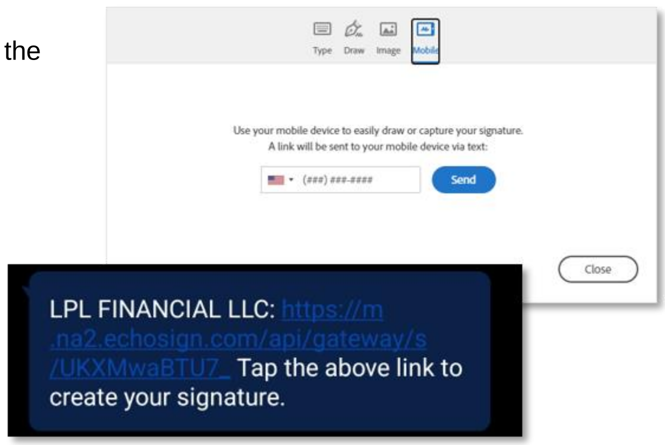
10. After all signatures are added click the **Click to Sign** button to submit the document.




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

## The Mobile Signing Experience

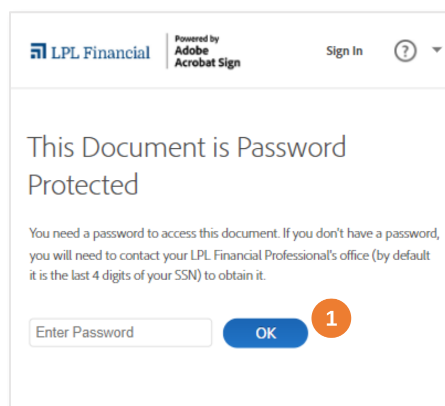
1. Enter the phone number of the recipient. That number will receive a text with a link to access the documents on a mobile device.




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

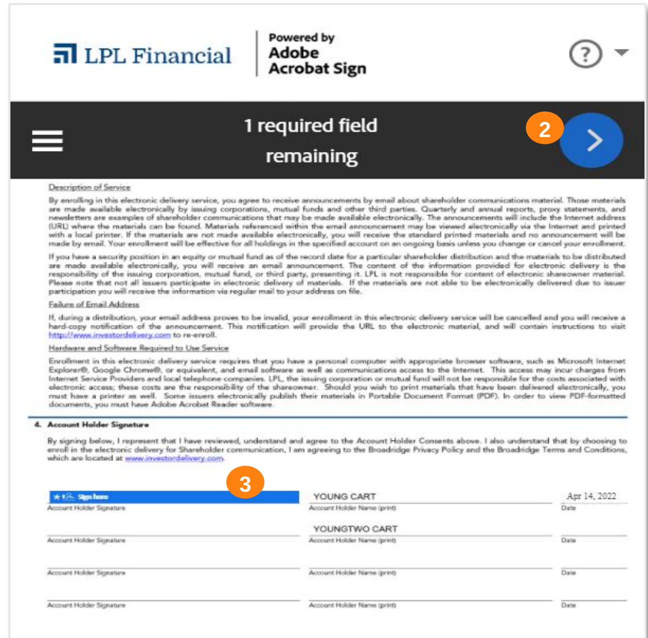
## Signing the Document – Mobile

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.

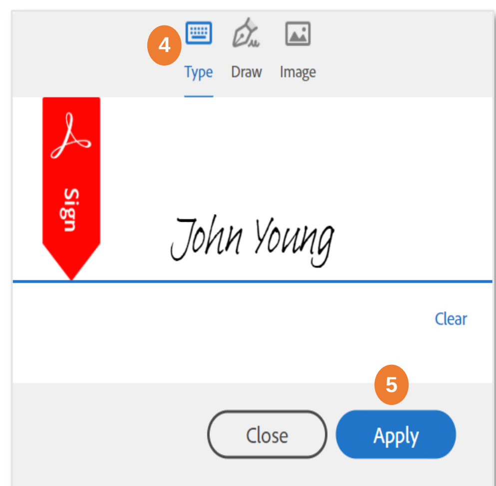
3. Tap the highlighted field to continue the signature process.




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

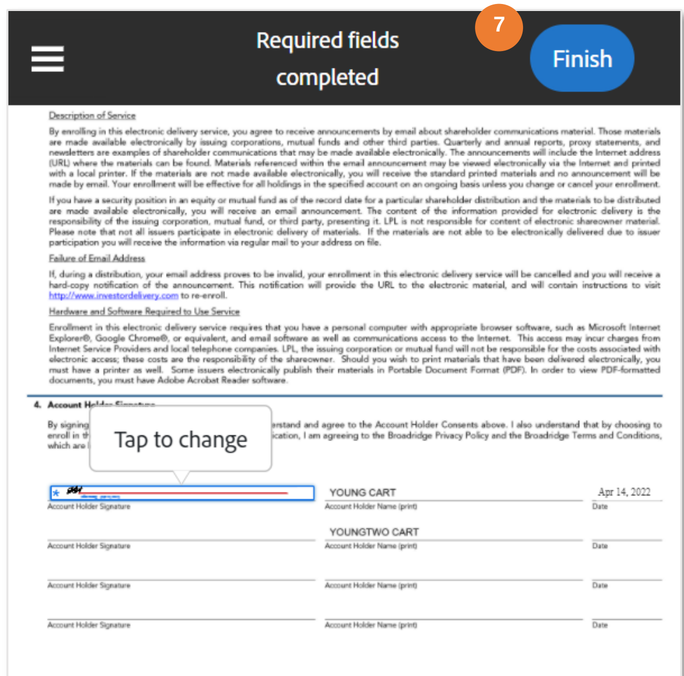
   - Use your virtual keyboard to type your signature or select draw to virtually sign the document. You can also utilize the image to use a signature saved on your device.

5. Select **Apply** to continue.

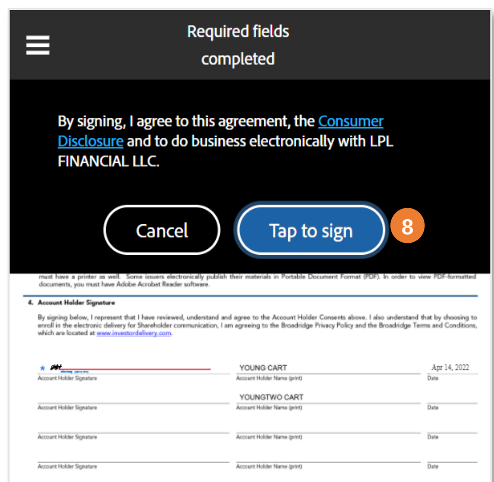


6. Continue signing all applicable areas, tapping the blue-highlighted fields to apply your signature.

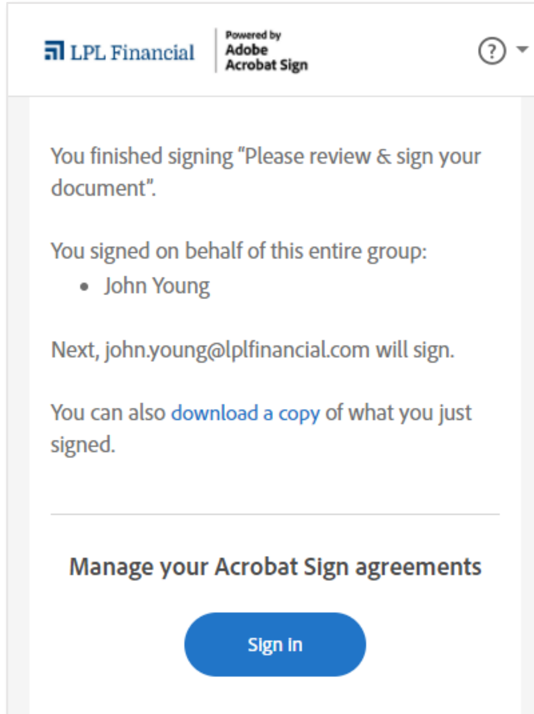
7. Select **Finish**, after all fields are completed.




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



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](here).