

Understanding E-SIGNATURES

DocuSign - exclusively available in the UK platform market via the James Hay Modular iPlan*

GOING DIGITAL

Introducing DocuSign digital signatures

DocuSign makes it easy for financial advisers to quickly and securely capture electronic signatures and important customer data for account openings and authorisations. Using DocuSign means a faster and more accurate transaction process in which you and your clients can have complete confidence.



DocuSign

So why should you go digital?

IT'S EFFICIENT

Saving money and time – faster more efficient service for you and your clients



Average time taken for an e-signature application form to be completed and electronically signed by the client

00:25:00
hrs mins secs

VS



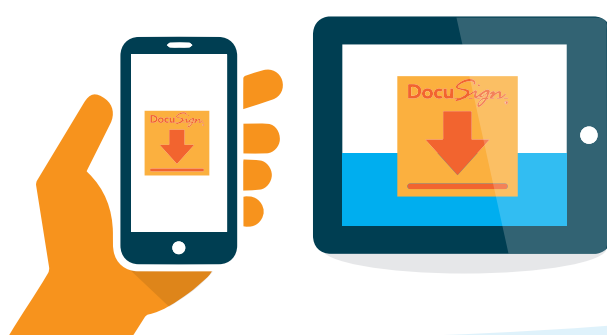
Average time taken for a standard electronic application form with wet signature to be completed - inclusive of postage

ACCURATE & ECONOMICAL

- ☒ **Error-proof** signing means **100%** complete documents, eliminating the need to track down clients to re-sign or re-send**.
- ☒ **Save money** on paper, printing and faxing.
- ☒ **Save time** and speed up the completion of a **Direct Debit** mandate required for personal pension contributions.

CONTROL & CONVENIENCE

You can **track the whole process** and conduct your business anywhere, anytime. Your clients also have the convenience of signing documents via their **computer, tablet or phone** wherever they are.



IT'S SECURE

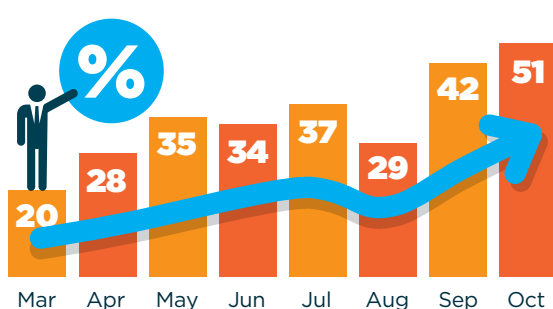
Trustworthy security for peace of mind

- ☒ DocuSign is the global industry standard for security and compliance.
- ☒ xDTM compliance - the highest standard of global information security and operations to protect your digital transactions.
- ☒ Full document encryption to ensure the confidentiality of your data.
- ☒ DocuSign employs strong anti-tamper controls to prevent any alteration of your signature or your documents.



IT'S RELIABLE

Recognised reliability has meant popularity is increasing and adopted by companies globally



Increasing usage amongst our advisers

Bank of America
Barclays
Citibank
Close
Goldman Sachs
UBS



Large financial institutions are using DocuSign

IT'S SIMPLE

Here's how it works in 5 quick steps



1 Log in to James Hay Online and complete a Modular iPlan application

Click 'APPLY' and select Digital signature



2

3

The client receives an email from us with a link to their application form



Client consents to Electronic Record and Signatures and reviews their completed application and other key documents

4



Sign here

5

Client clicks 'Sign here' and enters their names before digitally signing and submitting the application



* as at 6 February 2015

** incomplete applications cannot be submitted. Incorrect information will require correction.

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Apply now at www.jameshay.co.uk and login