

# 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.



Docu Sign

#### 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

secs hrs mins



So why should you go digital?

> 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 Barclavs** Citibank Close **Goldman Sachs UBS** 



Large financial institutions are using Docusign

# **IT'S SIMPLE**

Here's how it works in 5 quick steps



and complete a Modular iPlan application

Log in to James Hay Online

Click 'APPLY' and select Digital signature





0000 application form

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

> **Record and Signatures and reviews** their completed application and other key documents





and enters their names before digitally signing and submitting the application 0000

Client clicks 'Sign here'





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

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