

# E-Signature Remote Sign

## REFERENCE GUIDE

The Remote Sign electronic signature process is simple and easy with Firelight. Use this guide to learn what you will see and do during the remote signature process along with the customers' signing tasks and workflow.

CITY CREST FINANCIAL QA 2.41.11 Bill Jones Application

Auto Save Enabled Home Other Actions Open Activities (1) Training Log Off

100% DATA ENTRY SIGNATURES FINALIZE

You have provided all the required information for this application. You may enter more data or CONTINUE to proceed to electronic signature.

1 CONTINUE

Funding Source City Crest-Annuity Fast App

Funding Source

Source of funds used to purchase this product (Check all that apply)

Brokerage Account  CD/Savings/Checking  Current Income

Inheritance  Liquidation of Assets  Death Benefits Proceeds

Qualified Plan Distribution  Cash Value from Existing Annuity  Rollover/Transfer from qualified account

## Agent's Signature Process

### 1. Continue

Once data entry is 100% complete and a confirmation box appears, click **Continue**.

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DATA ENTRY 2 SIGNATURES FINALIZE

Electronic Signatures

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This application will be locked upon making these choices. No changes can be made after signing.

Use E-Signature Decline E-Signature

If you choose to use E-Signature, all signatures in this application will be collected electronically. Please read the Federal Regulations and Definitions. Please make sure all parties are equipped with these system requirements:

- Internet Access
- Minimum Screen Resolution 1024 x 768
- Valid browser: Firefox (current version), Safari (current version), Google Chrome (current version), Chrome and Safari mobile browsers.
- Cookies of HTML, Cookies and JavaScript Enabled

If you choose to decline E-Signature, all signatures in this application will be collected manually. Your application will be completed in our system. You may print the application PDF file and deliver to your client via postal or other means. Please note that delivery of the information electronically will result in a superior customer experience.

### 2. Use E-Signature

Click **Use E-Signature**.

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DATA ENTRY 2 SIGNATURES FINALIZE

Request Signers for Bill Jones Application

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Owner Brent Neumeier

Agent ITD IT

If the applicant represents more than one signer type, select each signer type that is applicable and click the "Sign Now" button.

4

Sign Now Send Email Request

### 3. Client Checkbox

Mark the **checkbox** for the client that needs to sign the application.

### 4. Send Email Request

Click **Send Email Request**.

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DATA ENTRY 2 SIGNATURES FINALIZE

Send Email To Owner: Brent Neumeier To Request Signatures

If you use "Send Email Request", your signer will receive an email message with instructions to complete the electronic application process.

Signer Name  
Brent Neumeier

Signer Email  
bneumeier@hexure.com

Your Name  
ITD IT

\*Signer Birth Date  
04/05/1950

\*These values will not show in email.

Subject  
Bill Jones Application - Please complete your signature

Message  
Dear <CLIENT\_NAME>,  
Thank you for applying for 'City Crest - Application Suitability' of City Crest Financial.  
Use the link included at the bottom of the email to start the signing process. You will be asked to acknowledge your acceptance of the disclosure terms and consents. The instruction for completing your 'Electronic Signatures' will be provided as well.  
Please use your birth date and the last 4 digits of your SSN to login.

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Send Email Request Generate Link Without Email Cancel

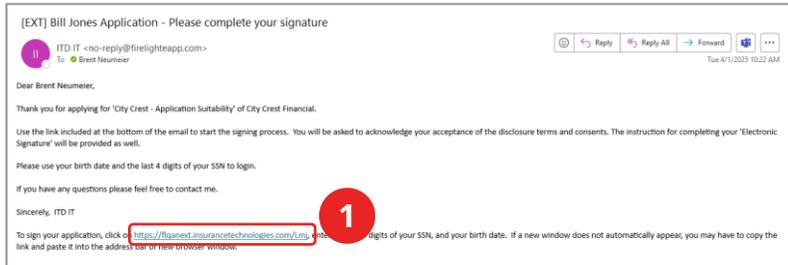
### 5. Send Email Request

Review the client's contact information and email message that will be automatically sent, then click **Send Email Request**.

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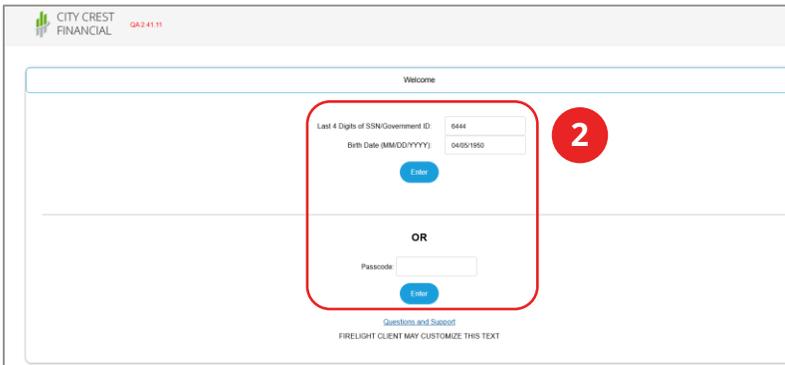
Once the email request has been sent to the client, your work in FireLight is done. The client will need to follow the steps below to electronically sign the application. These steps are completed by the client signing the application, not the agent or advisor.



## Client's Signature Process

### 1. Email Link

The client will receive an email. They must click the link in the email.



### 2. Verification

The client needs to enter the last **4 digits** of their **Social Security Number** and **Date of Birth** OR a Passcode to access the application.



### 3. Reviewed and Agree

The client must review the documents and mark the **"I have reviewed and agree with the terms within this document"** checkbox.



### 4. Signer Full Name

The client should type their name in the Signer Full Name field and click **I Consent**.