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.

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Agent's Signature Process

1. Continue

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

2. Use E-Signature Click Use E-Signature.

3. Client Checkbox

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

4. Send Email Request Click Send Email Request.

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.

(EXT) Bill Jones Application - Please complete your signature ITO IT - no-redpy@firelighteapp.com> To @ Birett Heumeer	(□) ←> Reply ≪> Reply All → Forward (□) ···· Tue 4/1/2005 10.22 AM <td< th=""></td<>
Dear Brent Neumeier,	
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 to Signature' will be provided as well.	erms and consents. The instruction for completing your 'Electronic
Please use your birth date and the last 4 digits of your SSN to login.	
If you have any questions please feel free to contact me.	
Sincerely, ITD IT To sign your application, click o <u>Interc//Itanient.insurancetechnologies.com/t.ms</u> , no. Ink and past it into the address bar of new process window.	window does not automatically appear, you may have to copy the





Signer Full Name	Will B. Dunn	City	Hayfield	
State	Alabama	✓ Today's Date	4/5/2024	
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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.**