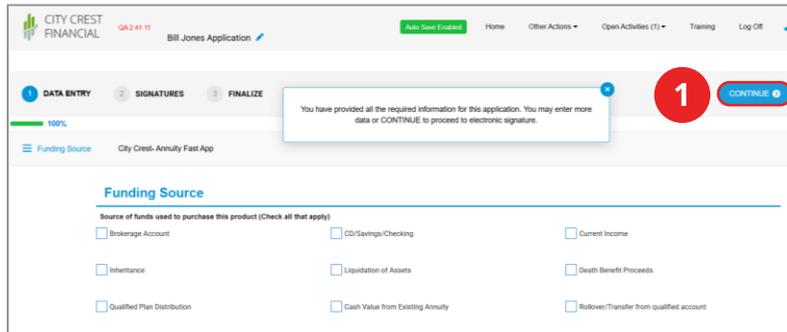


E-Signature Sign Now

REFERENCE GUIDE

The Sign Now electronic signature feature offers a simple and easy way for your client to sign their electronic application when the agent and client are together at the same location. Follow these steps to complete this signature process with a client.



CITY CREST FINANCIAL GA 2.41.11 Bill Jones Application

100%

Funding Source

City Crest-Annuity Fast App

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

Brokerage Account CD/Savings/Checking Current Income

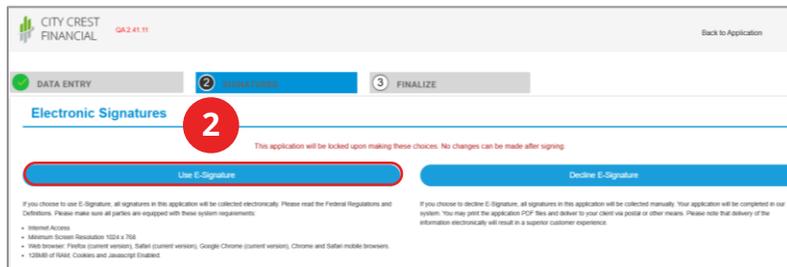
Inheritance Liquidation of Assets Death Benefit Proceeds

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**.



CITY CREST FINANCIAL GA 2.41.11 Back to Application

2

Electronic Signatures

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

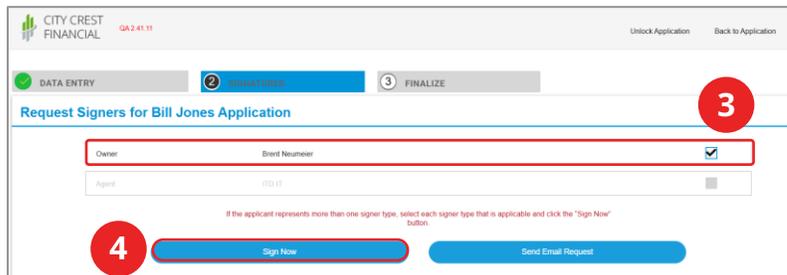
If you choose to use E-Signature, all signatures in this application will be collected electronically. Please read the Federal Regulations and Definitions. Please make sure all parties are equipped with these system requirements.

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 form 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.

- Internet Access
- Minimum Screen Resolution 1024 x 768
- Web browser: Firefox (current version), Safari (current version), Chrome and Safari mobile browsers.
- OS: Windows 7, 8, 10, 11
- OS: iOS 11, 12, 13, 14, 15, 16, 17
- OS: Android 8.0, 9.0, 10.0, 11.0, 12.0, 13.0, 14.0, 15.0, 16.0, 17.0
- OS: All of RAM, Cookies and Javascript Enabled

2. Use E-Signature

Click **Use E-Signature**.



CITY CREST FINANCIAL GA 2.41.11 Unlock Application Back to Application

3

Request Signers for Bill Jones Application

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.

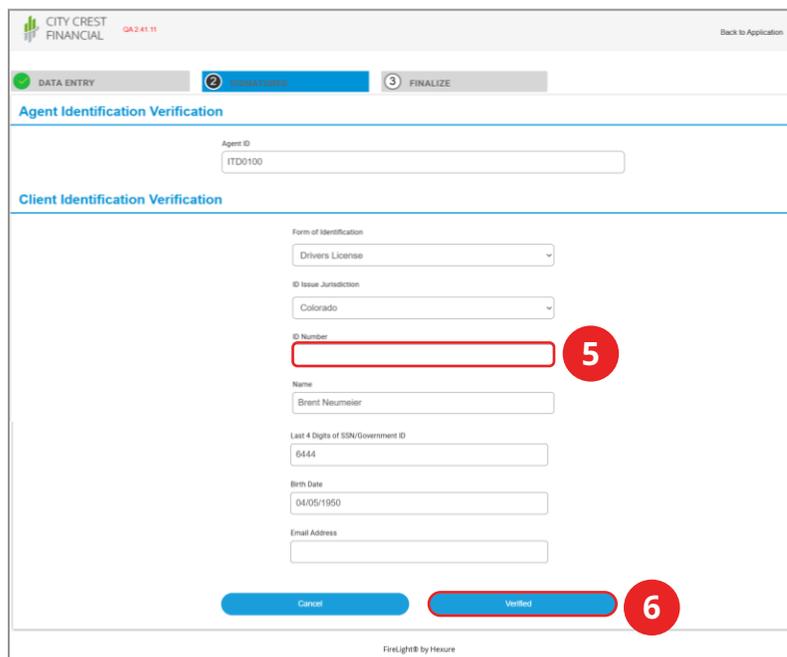
4

3. Client Checkbox

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

4. Sign Now

Click **Sign Now**.



CITY CREST FINANCIAL GA 2.41.11 Back to Application

5

Agent Identification Verification

Agent ID
ITD0100

Client Identification Verification

Form of Identification
Drivers License

ID Issue Jurisdiction
Colorado

ID Number

Name
Brent Neumeier

Last 4 Digits of SSN/Government ID
6444

Birth Date
04/05/1990

Email Address

6

Finlight® by Hexure

5. ID Number

Enter the signer's ID information.

6. Verified

Review the client's information for accuracy and click **Verified**.

E-Signature Sign Now

REFERENCE GUIDE

Once you have verified the client's information, it is time for the client to electronically sign the application. The client will need to follow the steps below to electronically sign the application. These steps are completed by the client not the agent/advisor.

The screenshot shows the 'CITY CREST FINANCIAL' application interface. At the top, there is a progress bar with three steps: 'DATA ENTRY', 'REVIEW AND AGREE' (highlighted in blue), and 'FINALIZE'. Below the progress bar, the owner's name is listed as 'Owner: Brent Neumeier'. A red box highlights a button labeled 'Annuity Suitability And Disclosures Form' with a red circle containing the number '1'. Below the button, there is a checkbox labeled 'I have reviewed and agree with the terms expressed within this document.' The document title is 'Suitability Review Summary and Disclosures - Annuity Products'.

Client's Signature Process

1. Reviewed and Agree

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

The screenshot shows the 'CITY CREST FINANCIAL' application interface. At the top, there is a progress bar with three steps: 'DATA ENTRY', 'CAPTURE SIGNATURE' (highlighted in blue), and 'FINALIZE'. Below the progress bar, the title is 'Capture Electronic Signature'. There are four numbered steps indicated by red circles: '1' is the 'Annuity Suitability And Disclosures Form' button from the previous step; '2' is the 'Signer Full Name' field containing 'Brent Neumeier'; '3' is the signature pad showing a handwritten signature 'Brent Neumeier'; and '4' is the 'I Consent' button. The 'Signer Full Name' field also includes a 'City' dropdown set to 'Leadville'. Below the signature pad, there are buttons for 'I Consent', 'I Decline', 'Cancel', and 'Clear Signature'.

2. Signer Full Name

The client must type their name.

3. Signature

The client must sign their name.

4. I Consent

The client needs to click **I Consent**.