

# Digital signature acceptance

## Updated guidelines on acceptable submissions

We are accepting new business applications that have been signed using Adobe Sign OR DocuSign. The following is a set of updated guidelines to assist with the submission of new applications, thereby ensuring a seamless process.

### DocuSign

- Any signed instruction submitted must be accompanied by the corresponding certificate of completion.
- The envelope originator must be an individual at the brokerage, the email address for the originator must be a registered domain for a brokerage with whom we have terms of business not a personal email account e.g. @gmail.com
- The client signature will be either a 'Drawn on Device' signature or a 'Pre-selected style' signature.
- If the signature is a 'Drawn on Device' signature this must be a true likeness of the client's signature on their ID (passport/ID card) or the signature held in our records.
- The signatory's email address must match their registered email address / email address on the application.
- The document(s) eSigned by the client must be emailed to Friends Provident International Limited (FPIL) in the format received.
- Documentation eSigned by clients must not be amended or combined with other images once the

client has signed. Each document signed by the client and shared with FPIL must contain the embedded validation panel with the PDF/file.

- Failure to adhere to these standards will result in re-submission of documentation/evidence or the request being rejected
- We will also require an image of the client's true signature on plain paper next to their passport opened on the photographic page (this image does not need to be certified) on all new business application (not required for top-up applications).
- A copy of the application and supporting documents submitted will be shared via secure email with each client for review.

### Adobe Sign

- Any signed instruction submitted must be accompanied by the 'final audit' report.
- Users must select the option to include 'transaction ID' when producing the PDF for signature, this will stamp a box on the PDF with the transaction ID, enabling us to verify the document received, with the final audit report.

- Each document submitted must be stamped with the transaction ID and accompanied by the corresponding final audit report for this transaction ID.
- The document creator must be the brokerage with whom we have terms of business and the email address for the originator must be from a registered domain not a personal email account e.g. @gmail.com.
- The document should be emailed to the client's registered email address / the address on the application form.
- The client signature can be hand-signed, drawn, an existing saved image of the signature, or a picture of the signature may be taken.
- The signature must be a true likeness of the client's signature on their ID (passport/ID Card) or the signature held on our records.
- The signatory's email address must match their registered email address / email address on the application.
- The document(s) eSigned by the client must be emailed to FPIL, in the format received.
- Documentation eSigned by clients must not be amended or combined with other images once the client has signed. Each document signed by the client and shared with FPIL must contain the embedded validation panel with the PDF/file.
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