

# Accepting DocuSign and Adobe Acrobat Sign signatures

**DocuSign and Adobe Acrobat Sign<sup>1</sup>, are the e-signature methods approved by Foresters Financial™ that can be used for outstanding new business forms or questionnaires and delivery requirements.**

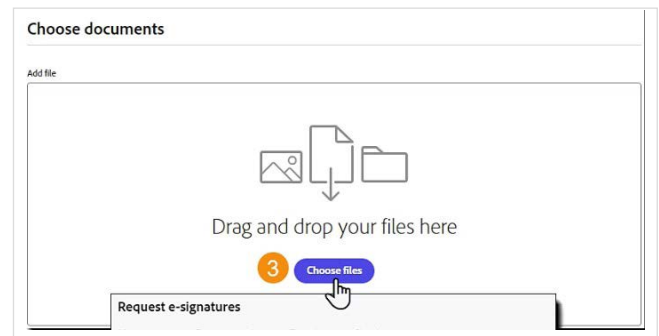
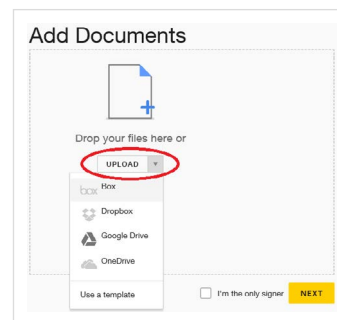
## How to use DocuSign and Adobe Acrobat Sign with Foresters?

**1. Obtain the Foresters documents requiring signatures:**

- a. **Trailing documents or questionnaires:** You will download any required New Business documents from Certificate Details as you currently do today. *Note:* DocuSign and Adobe Acrobat Sign cannot be used to obtain signatures on the initial application. For the initial application, e-signature for Term, Advantage Plus II, SMART UL, BrightFuture, and Prepared II<sup>2</sup> are only available through iPipeline's e-App<sup>3</sup> and for PlanRight through Apptical LiveApp<sup>4</sup> and their approved signature methods.
- b. **Delivery requirements:** You will receive your client's delivery requirements via secured email if eligible or by mail if not eligible for e-delivery.
- c. **In-force forms:** DocuSign submission of the following in-force forms are allowed by the producer of record; Loan, loan repayment, partial surrender, surrender, name change, conversion, AOR change, payment instruction form, and PAC form. You will download the allowed in-force forms from ezbiz as you currently do today. For certificates without a servicing producer or to change the producer of record, a Producer Change form must be completed prior to utilizing DocuSign.<sup>5</sup> Adobe Acrobat Sign for in-force forms is not accepted.

- 2. Speak with your client to obtain the necessary information to complete the document and then scan or save the document to a PDF file. To ensure that your business is processed on a timely basis, please do not use the same device as your client for DocuSign or Adobe Acrobat Sign e-signatures.**

**3. Upload the PDF file to DocuSign or Adobe Acrobat Sign.**

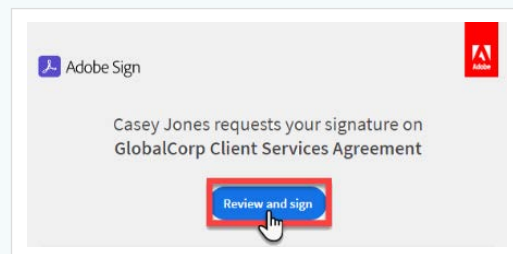
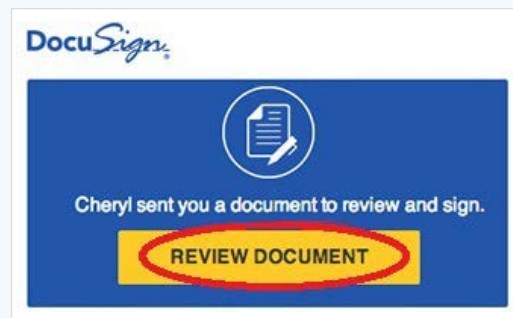


4. Indicate who needs to sign the document by adding the client's name and email address. If more than one individual requires to sign, simply add each party's name, email address, and identify the order in which they should sign the document. Each required signer must have their own email address and IP address belonging to them when signing the application or supporting documents. Additionally, as the producer, you cannot use your own email address or have access to or set up an email address for the signer. When e- signatures are used, a signer's e-mail address and IP address are your only lines of defense to protect yourself against E&O claims or a recall of commissions if the client claims they did not sign the application or supporting documents.

Order	Name	Email	Action
1	Dave@nope.dom	Dave@nope.dom	Email
2	Samwise@gamgee.dom	Samwise@gamgee.dom	Email
3	Dave@nope.dom	Dave@nope.dom	Email
4	Myself	Myself	Adobe Sign
5	Enter recipient email		

5. Place required signature fields into DocuSign or Adobe Acrobat Sign, by dragging and dropping the DocuSign or Adobe Acrobat Sign fields into the document, to indicate where the Owner, Insured or Payor should sign. Once all fields are created, send the document to the recipients within DocuSign or Adobe Acrobat Sign. Once sent, producers can track the document status using the DocuSign dashboard or Adobe Acrobat Sign Manage page.

6. Recipients will receive an email from DocuSign or Adobe Acrobat Sign, which will include a link to access the document. Once the link is clicked, they will follow the DocuSign or Adobe Acrobat Sign tabs and simple instructions to guide them through the signature process. *After the document is signed, the recipient clicks "Finish" on DocuSign and "Click to Sign" on Adobe Acrobat Sign to complete the process.* It's important to note that these electronic signatures are secure and legally binding.



7. If your signature is required, follow the same steps to be able to complete your e-signature. For your email address, please use the email Foresters has on file for you. Once signatures are obtained from all required signing parties, you can download the completed document from DocuSign or Adobe Acrobat Sign. Completed documents can be submitted to Foresters by uploading to Certificate Details, SecureDocs, responding to Foresters secure email (for delivery requirements only), fax, or mail. A copy of the Certificate of Completion, provided within DocuSign or a copy of the Final Audit Report, provided within Adobe Acrobat Sign, must be submitted to Foresters along with the appropriate signed document. Without the Certificate of Completion or Final Audit Report, the request will not be processed resulting in delays.

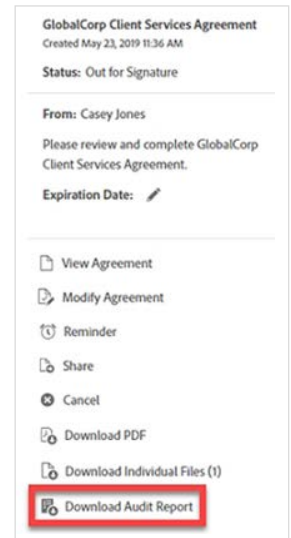
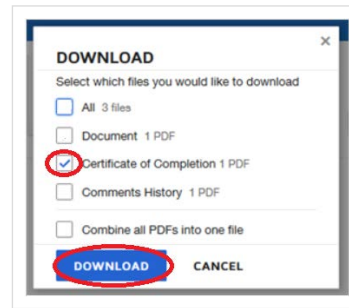
8. To access the required Certificate of Completion from DocuSign for your desired client, select *Manage* from the top navigation toolbar or *Final Audit Report* from Adobe Acrobat Sign, then either search, filter, or simply scan the list for your client's email:

a. Once the email is located, open the email to show the detailed view and then select the download button.



RECIPIENTS	STATUS	TITLE	MODIFIED
io@jupiter.dom	Out for Signature	GlobalCorp Client ...	5/23/2019
opus@nonorbus.meh	Out for Signature	Direct_Deposit_Fo...	5/19/2019
callope@jupiter.dom	Out for Signature	GlobalCorp Client ...	5/18/2019
mymanager@caseyjones.d... 0 of 4 completed	Out for Approval	GlobalCorp Client ...	5/18/2019
callope@jupiter.dom 0 of 3 completed	Out for Signature	New Hire Packet	5/10/2019

b. Select Certificate of Completion as the desired file, select the download button or Final Audit Report and save the PDF file to your personal folder or Download Audit Report button.



- 1 DocuSign or Adobe Acrobat Sign is a third-party vendor that is not supported by Foresters. Questions regarding DocuSign or Adobe Acrobat Sign should be referred directly to DocuSign Customer Support at (800) 379-9973 or Adobe Acrobat Sign Support at <https://helpx.adobe.com/support/sign.html>.
- 2 Foresters products and their riders may not be available or approved in all states and are subject to underwriting approval, limitations, contract terms and conditions, and state variations. Refer to the applicable Foresters Producer Guide and the insurance contract for your state for these terms and conditions. Underwritten by The Independent Order of Foresters.
- 3 e-App is available through the iPipeline iGO e-App platform using Microsoft Edge (desktop/laptop) or Safari (Apple iPad only) for Foresters non-medical and medical products (excluding Foresters PlanRight). Touch to Sign is available on Apple iPad only. POS decision for non-medical products will be unavailable Monday to Saturday from 2:00 a.m. to 6:00 a.m. and from Saturday 10:00 p.m. to Sunday 10:00 a.m. (ET). Some e-App features are not available in NY (refer to <https://myezbiz.foresters.com/en/e-app> for more details).
- 4 PlanRight LiveApp is not available in Massachusetts and New York.
- 5 Foresters may contact signers to confirm information.

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