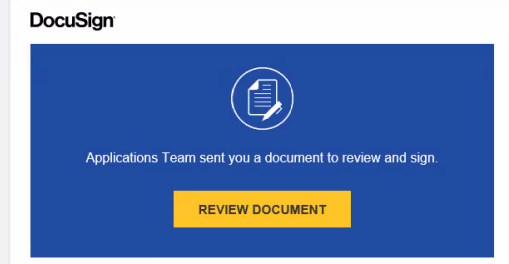


Digital Signature Guide

For your convenience, Overseas Trust and Pension enables you to sign documents securely and efficiently through DocuSign. This process applies if you have not signed an original document or where we have only received scanned copies. To assist you, the following guide provides a walkthrough of what to expect when signing a document digitally.

STEP 1

Open and Review: When we send you a DocuSign document for your digital signature, you will first receive an email from our secure DocuSign account. Click Review Document to begin the signing process.



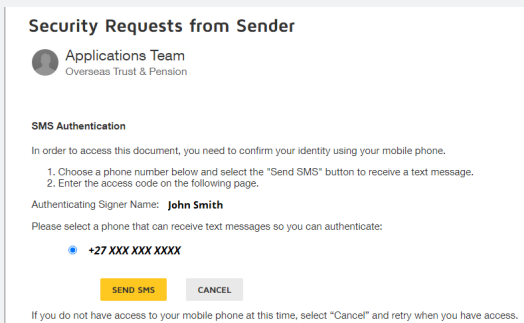
STEP 2

Agree to Sign: Select the checkbox "I agree to use Electronic Records and Signatures" and click Continue.



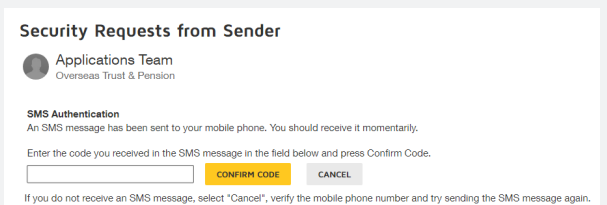
STEP 3

SMS Authentication: In order to access and sign the document, you need to confirm your identity using SMS verification. When clicking "Send SMS", a unique code will be sent to your mobile phone. *Your mobile number will be shown in this window.*



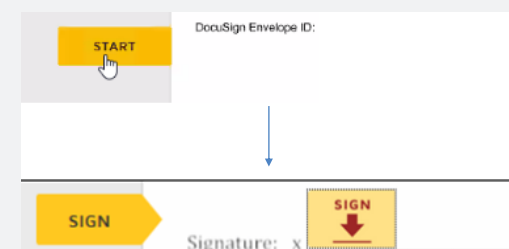
STEP 4

SMS Authentication: Once you click "Send SMS", check your mobile phone for a text message with the unique code. Enter the code you received and click "Confirm Code".



STEP 5

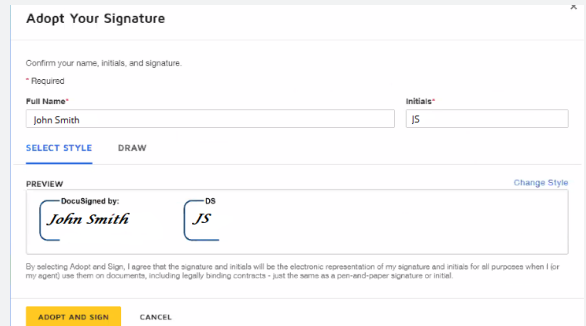
Signing Digitally: Click Start on the page displayed, then you will be taken to each section of the document that requires your signature. Click on the signature tag at each of these points to sign.



STEP 6

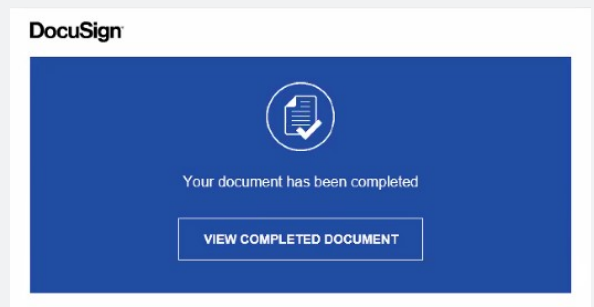
Your Digital Signature:

1. Verify that your name and initials are correct.
2. Choose a style of Signature that suits you
3. Click Adopt and Sign



STEP 7

Confirm signing: When you finish signing all signature tags in the document, click Finish. A message appears stating that you have completed your document. You can now download a PDF copy or print a copy for your records. We will then receive the signed document in our Account.



Please note: If you are an Adviser and your Firm already has a DocuSign account and has assisted the Client in signing the Form via DocuSign, you can send us the digitally signed Form as well as the DocuSign Authentication Certificate.

Please remember to include the two-step authentication via the Client’s email address and their mobile phone number during the DocuSign process. This step is essential, as it demonstrates the correct security measures have been carried out. This step must be visible on the DocuSign Authentication Certificate that you send to OTAP. If it is not visible on the Certificate, we will unfortunately not be able to accept the documents.

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