Assurity - Agent Link

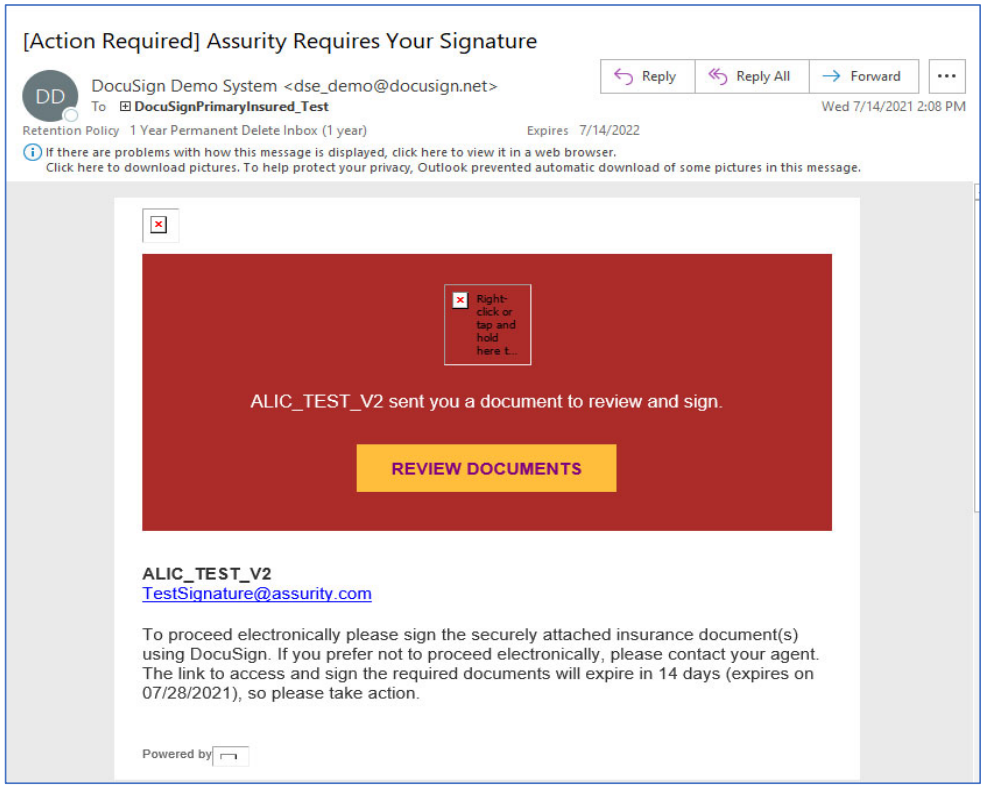
Client Process

Client Email

Example of the email to review the policy and complete the requirements received by the client(s); in cases with multiple insureds or third party policy owners/payors each will receive their own email to review and complete their portion of the requirements

Select the “Review Documents” button

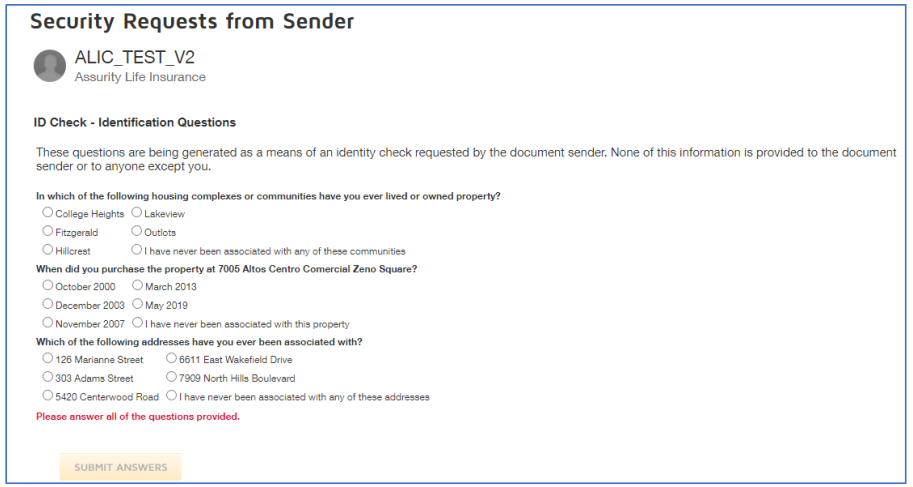
Note the link is **only active for 14 days



Signor ID Verification

Each Signor will be asked 6 ID verification questions generated by DocuSign's database

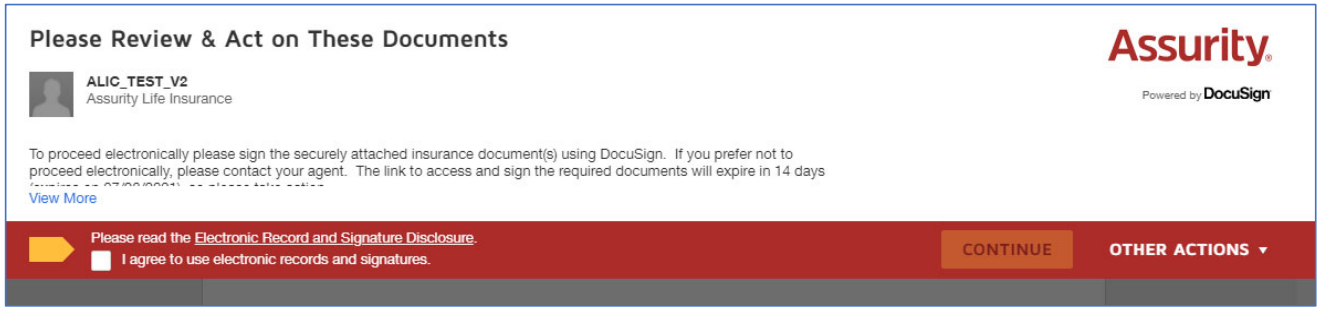
If the Signor incorrectly answers 3 questions they will be provided 3 additional questions

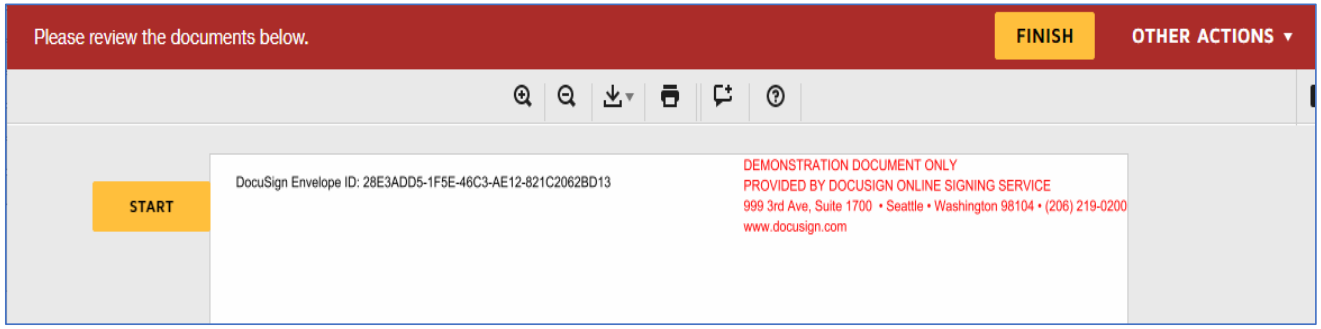


Signing Requirements

Click ‘I agree’ and review documents

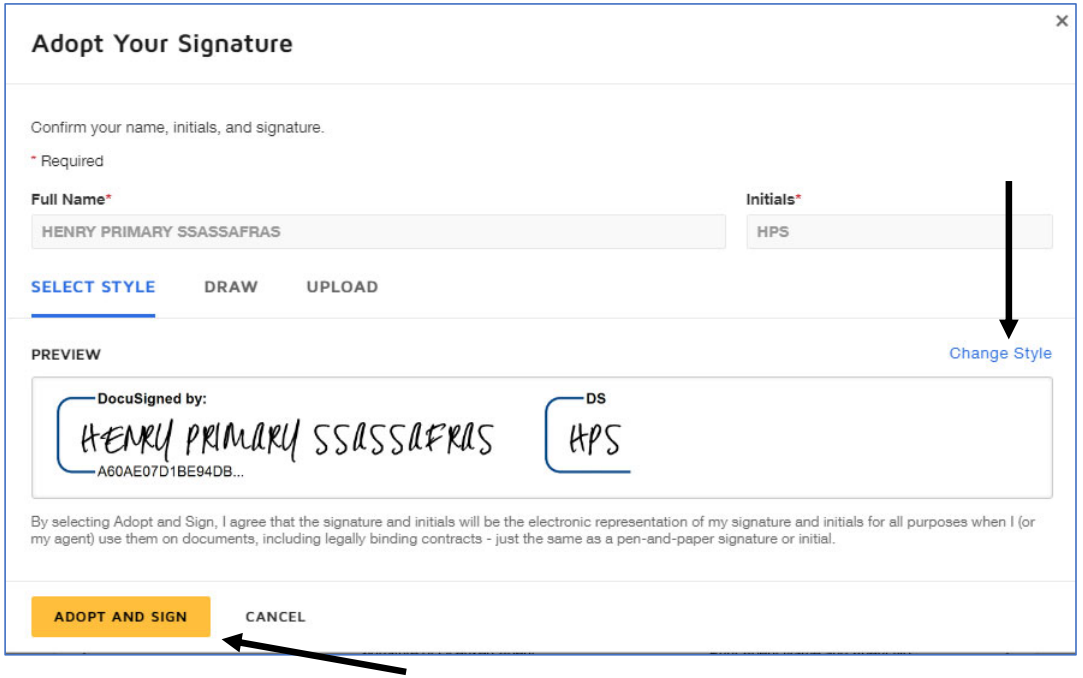
Signor will need to agree to DocuSign’s Disclosure and select ‘Continue’ and then they are able to review the policy; selecting ‘Start’ will take them to the first place their signature is required





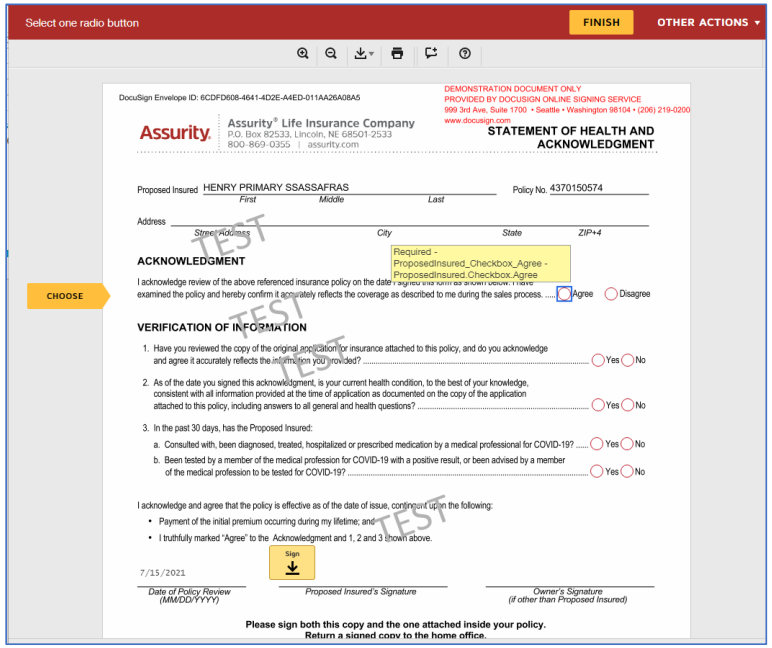
At the first instance of the Signor's signature being required they will be prompted to Adopt a signature, they can make changes by clicking on 'Change Style', once a selection is made they will need to select the 'Adopt and Sign' button

DocuSign will guide the Signor through each requirement requiring their signature, select 'Finish' upon completion

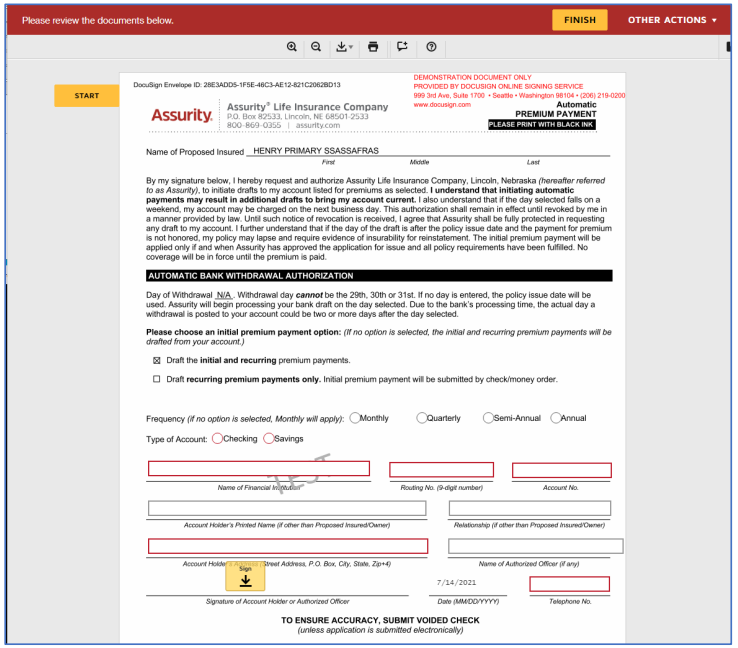


Some requirements need more than a Signature

Acknowledgements- Signor will need to select the applicable answer to questions along with signing

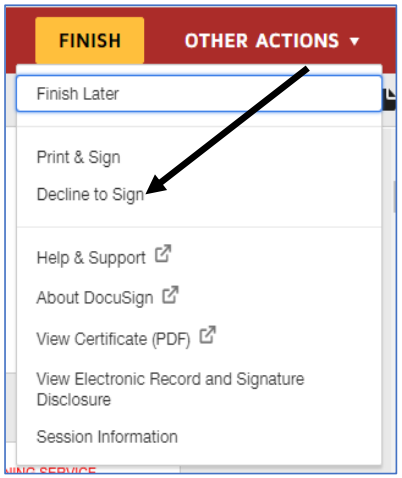


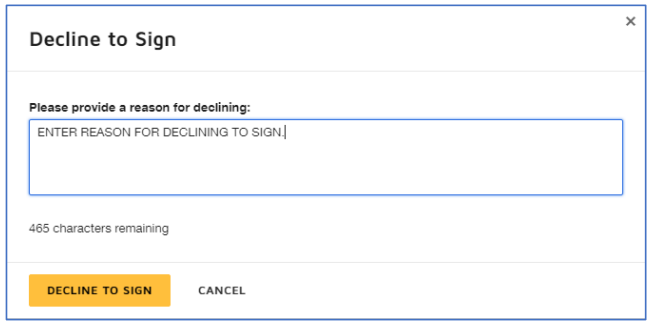
Automatic Premium Payment forms- Payor will need to enter account information, type, and address along with signing. Frequency is not required, and will default to monthly if not answered



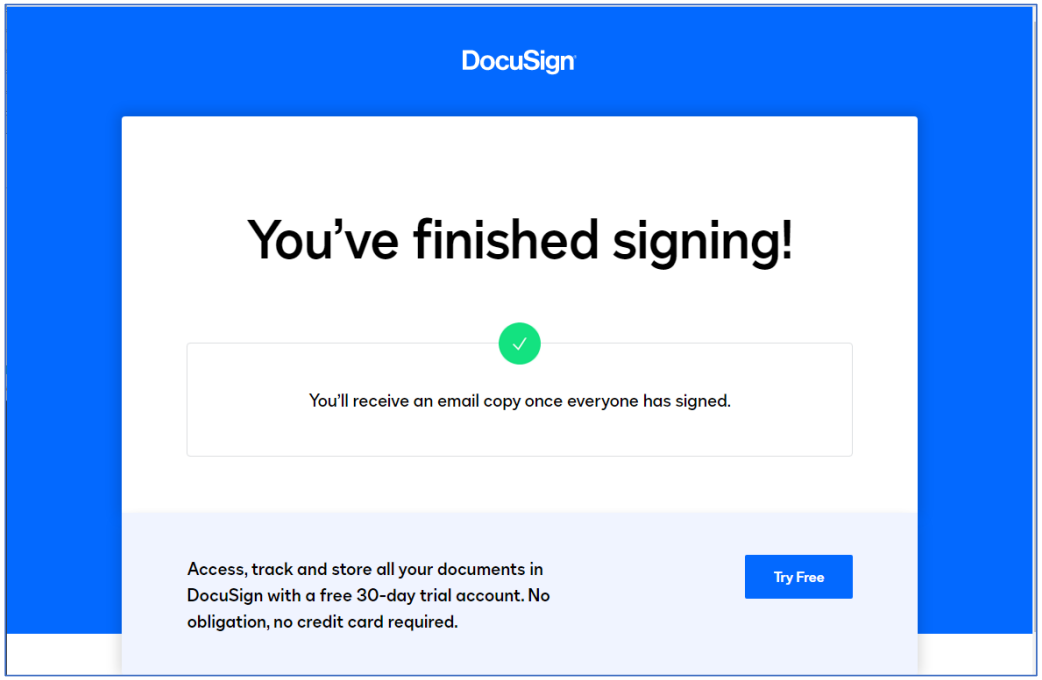
If changes are needed

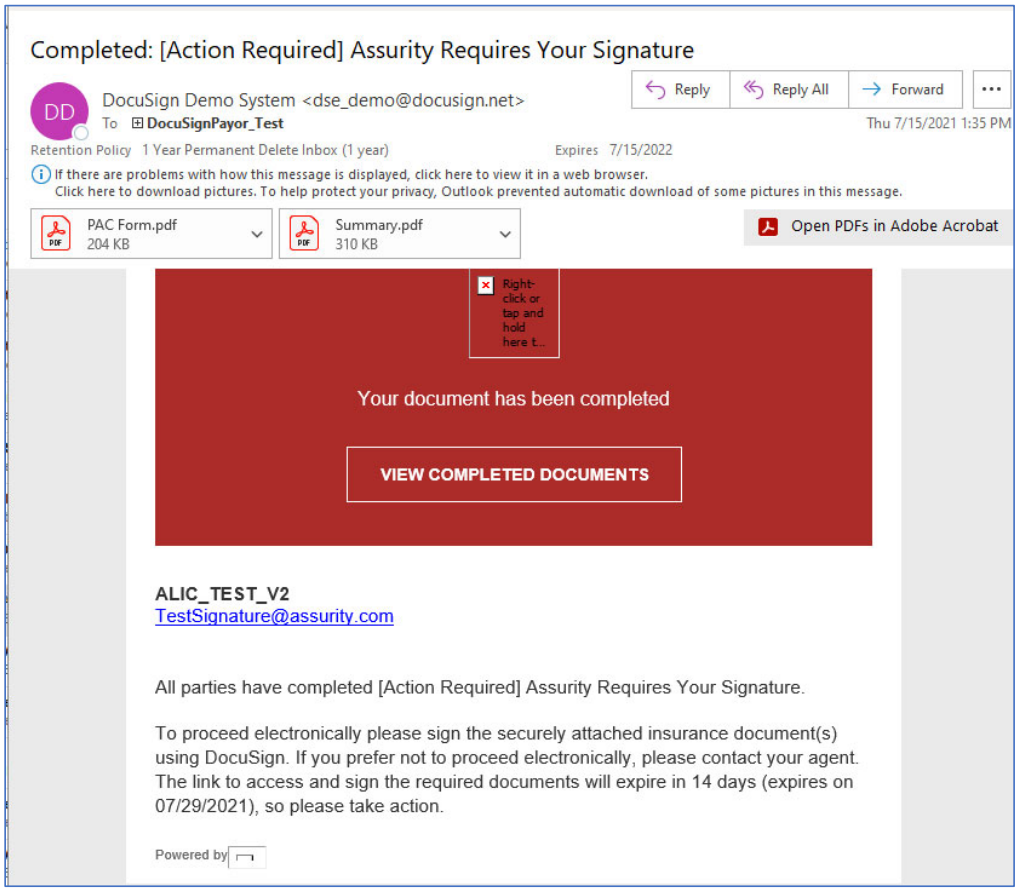
If the policy is not correct, or changes are to be made Decline to Sign via the option under the Other Actions drop-down; complete the pop-up with the reason





Upon completion you will receive the following screen



Completion Emails

Once all Signors have completed their requirement(s) you will receive an email that the process is complete