eDelivery

Client Steps

- The client will receive an email with a link to view the policy packet and sign the delivery documents. The sender of this email will be North American and the subject line will be **Your policy is ready to sign**. Within the email your client will click the **Review Documents** button which will take them to a webpage where they will need to enter their personal information to authenticate their identity.
- At the authentication page, your client will enter their *first name, last name, last four digits of their social security number, date of birth*, and then click the **Continue** button. As long as the system can match their information to a policy pending eDelivery, they will be taken to DocuSign. If the information entered cannot be matched, a message will appear that indicates this and to contact their agent for assistance.
- Before they can review, complete, and sign the policy documents, your client must review and consent to the 'Electronic Record and Signature Disclosure'. Once it has been viewed, your client will check the acknowledgment box and click the **Continue** button.
- Your client will be brought to the first page of the policy packet. Once they are ready to eSign, they can navigate to the first delivery document by clicking **Start**. Once in a delivery document, your client will need to complete the document if applicable and then click the **Sign** and the **Adopt and Sign** box. Their eSignature will be automatically applied and they will be brought to the next document that requires a signature. They will need to complete the same steps for each delivery document. When all delivery documents have been completed and signed, they will click **Finish**.
- A pop-up will appear with options to download and/or print the policy documents. Within this pop-up, clicking **Continue** will finalize the process and direct your client to a thank you page advising them they have successfully completed the eDelivery process.

Once all parties have completed their eSignatures, the delivery documents will be automatically transmitted to New Business for review and handling. The indicator that your client has completed the eDelivery process will be the receipt of the 'eSignature Requested with eDelivery' requirement. You may access the completed and signed policy documents using the link in your original email.

For any questions regarding the **eDelivery process**, please reach out to your MGA.

DocuSign is an independent third-party company and is not affiliated with North American.

ADDvantage Term (policy form series LS174) and Classic Term (policy form series LS188), or state variation including all applicable riders and endorsements, are issued by North American Company for Life and Health Insurance, Administrative Office, One Sammons Plaza, Sioux Falls, SD 57193. Products, features, riders, endorsements, or issue ages may not be available in all jurisdictions. Restrictions and limitations may apply.

Sammons Financial℠ is the marketing name for Sammons® Financial Group, Inc.'s member companies, including North American Company for Life and Health Insurance®. Annuities and life insurance are issued by, and product guarantees are solely the responsibility of, North American Company for Life and Health Insurance.