



# DocuSign for Wealth Management & Insurance

The smart, secure way to electronically send, sign, track and store documents.

DocuSign enables Wealth Management and Insurance companies to get the signatures needed to close transactions in minutes. Eliminate printing piles of paper and waiting for signed faxes. DocuSign delivers a secure e-signing solution to close deals faster and build stronger customer relationships.

- Gain insight.** Track the status of your documents in real-time—you'll have greater insight into the document signing process than ever before.
- Accelerate revenue.** Use DocuSign to quickly electronically send and sign your documents in minutes.
- Reduce costs.** Collect data in your documents and automatically update your CRM/CMS when the deal is done.
- Knowledge is power.** Know exactly when it's delivered, know when it's opened, know when it's signed, know when your deal is closed with DocuSign.

DocuSign manages the document signing process online. Senders simply drag and drop *Sign Here* tabs into the document and click send. The recipient receives an email notification, adopts a signature and is guided through the e-signing process. All parties are notified when the document is completed. Documents are completed faster, more accurately and are automatically archived for future reference. Sales cycles are significantly shortened. DocuSign makes it easy to streamline operations and accelerate revenue with complete visibility and control into the document signing process.

In addition to managing the e-signing process, DocuSign provides data collection, workflows, templates and sequential signing capabilities in addition to advanced functionality with signer attachments. And, DocuSign's Designed for Mobile functionality offers electronic signing from any Apple® iPhone®, RIM® BlackBerry®, Google® Android™, Windows Mobile® or any other mobile device.

## Key Benefits

- **Easy.** No software to download. No hardware to purchase. All you need is Internet access.
- **Fast.** Drag and drop *Sign Here* and data field tabs into your document and send. The signer is notified by email, authenticated and guided through the signing process. The document is completed and returned electronically in just minutes.
- **Signer Friendly.** Familiar, easy to identify *Sign Here* tabs quickly guide signers through the electronic signing process. Errors are minimized and the signer must complete the document. DocuSign can cut Not in Good Order (NiGO) rates by 50%.
- **Safe & Secure.** DocuSign leads the industry in security. Multiple levels of authentication ensure the right person receives the right document. Our fully redundant infrastructure ensures safety and reliability. DocuSign has consistently passed information security audits by Fortune 500 companies.
- **Comprehensive.** DocuSign is the premier electronic signature solution offering real-time document visibility and control throughout the document signing process. Know who, what and when—backed with a complete audit trail. Capture all document transaction data in one centralized location.

"Cool Vendors in Security and Privacy"

DocuSign has been recognized by Gartner's research team as a "cool vendor" because of its innovative electronic signature solution which enables users to do something they couldn't before—sign and complete legally-binding contracts online. DocuSign also caught Gartner's interest because of the technology's ability to deliver significant business impact.



"The whole transaction is completed in a much shorter timeframe, and there is less follow-up on our part."



Duncan Hannah  
Assistant Vice President  
Amica Life Insurance

"Using technology such as e-signature in a high-tech, high-touch manner can help advisors unlock the opportunity for more personal and comprehensive relationships with their clients."



Ed O'Brien  
Senior Vice President  
Fidelity Institutional Wealth Services

"DocuSign is clearly the best in security, and the customer service is also vastly superior. We were using another eSign provider, but the security just did not measure up... DocuSign is the right choice."



Mike Schultz  
President & CEO  
Pinnacle Health Solutions

## Key Features of DocuSign for Salesforce

- E-SIGN compliant eSignatures obtained through DocuSign are legally binding and court admissible.
- Secure, enterprise-class service ensures a completely tamper proof signing process.
- Convenient Web console offers 24/7 real-time document control.
- Time-saving templates and workflows; assign recipient routing order and correct documents; and collect valuable client data **during** the signing process and eliminate errors by automatically integrating data into your existing CRM system.
- Leverage DocuSign Advanced Envelopes with in-person signing, signer attachments, recipient document visibility, automatic document retention, purging and more.
- Optional configurable branding extends your brand with logo, color palette and custom instructions.
- Flexible and scalable, with reporting capabilities.

## Training, Support & Upgrades

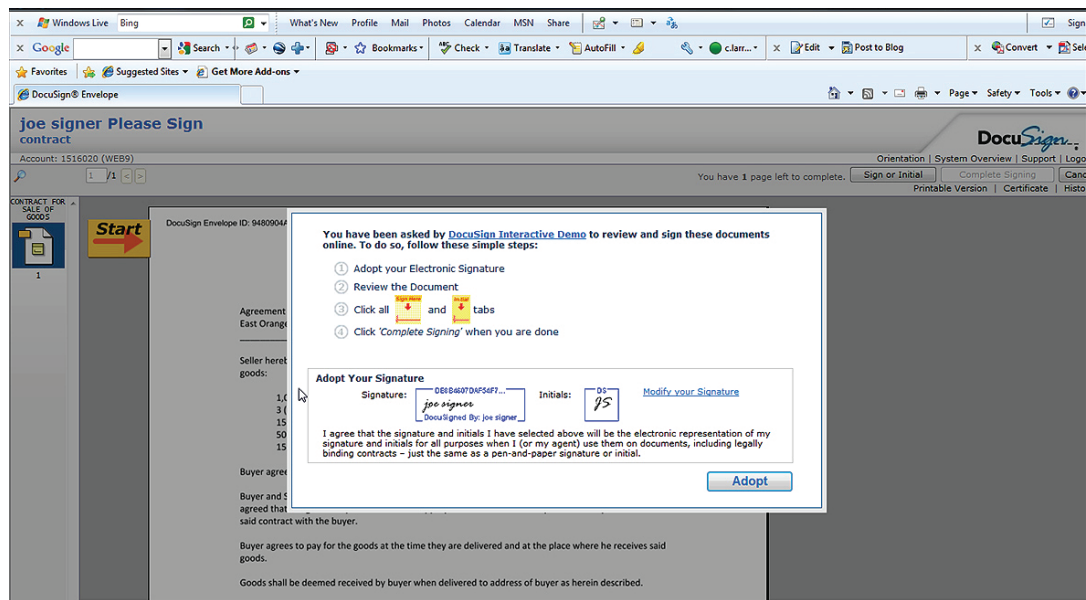
Full technical support through email, online chat, telephone and on-demand training videos.

Our optional premium support package includes both sender and signer telephone and email support, plus interactive trainings.

And remember, all future releases and upgrades are included with your DocuSign subscription.

## Get DocuSign for Salesforce Today!

For more information or to request a free trial, contact DocuSign at 866.219.4318 or email [sales@docusign.com](mailto:sales@docusign.com). Visit [www.docusign.com](http://www.docusign.com) to learn more about DocuSign electronic signature services.



*"The introduction of DocuSign into our collections process significantly improved Days Sales Outstanding (DSO) contributing to access to over \$1 million in additional working capital on an annualized basis."*

*"It immediately goes from the customer's office to the supplier so there is a very little gap in time for the market to move. DocuSign helps the customer lock in a rate at a low price and ensures that it gets preserved even if the market is moving quickly."*

*"With DocuSign, we don't have to worry about tracking down faxes or paper documents anymore...everything is automatically integrated into our CRM system. And, DocuSign maintains a permanent record with a full audit trail that validates every signature."*



Brian Frank  
Director of Global Enterprise Operations  
LinkedIn



Scott Chilton  
President & Managing Partner  
Community Energy, LP



Pat Hochstein  
Vice President of North American Sales  
Worldspan



The fastest way to get a signature.®

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