

Remote Client e-Signature Guide for Clients

Remote Client e-Signature is a new, streamlined functionality that allows you to electronically sign required account opening documents in a secure, online environment.

What you need to know:

- Remote Client e-Signature is easy to use and will only take a few moments of your time
- This is an additional way for you to sign new account documents

Overview:

You can now electronically sign the required account documents remotely through the following three ways:


1. By selecting the verification link provided in the Remote Client e-Signature email through the online verification path (applicable to new clients that have never logged in)
2. By selecting **Log In** at www.folioclient.com through the Folio Client login path (applicable to new and existing clients)
3. By selecting the **Sign Now** link on the **Restrictions Info** web page through the Folio Client Restrictions page


We've designed Remote Client e-Signature to be extremely easy-to-use for you and created this guide to help walk you through the process. However, if you have any questions, please don't hesitate to contact your advisor or our Folio Institutional Customer Service Team at **1-888-485-3456**.

Step 1: Client Verification

Instructions:

- New clients that have never logged in will receive an email with a verification link from their advisor - This link is valid for seven (7) calendar days
- When you select the link in the email, you will be directed to the verification page shown below
- We require the following items for our verification: Your Folio Client Username, the last four digits of your Social Security Number (SSN) and your Date of Birth
- When you successfully verify your identity, you will be prompted to enter a new password


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 **Verify your identity**

Username

The Last 4 Digits of SSN

Birth Month Day Year

Welcome to Folio Client.

Please enter the username provided to you by your advisor, the last 4 digits of your Social Security Number (SSN) and your date of birth below to verify your identity.


Next, you will be prompted to enter a new password and electronically sign the account opening documents to complete the account opening process and remove the restriction on your account.


For your security, you will have three login attempts on this page before this account is locked. If you lock your account, please call us at **1-888-485-3456**. Please note that the link you used to access this page will expire after 7 days.

Step 2: Enter a New Password

Instructions:

- Once you have successfully verified your information, you will then be prompted to enter a new password on the page shown below
- Passwords must meet our Password Criteria (see page shown below)
- Once you provide a password that meets our criteria, you will be directed to the signatures page where you will be prompted to sign the required new account documents


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 **Enter New Password**

New Password:

Confirm New Password:

Thank you for confirming your information

For your security, you need to provide a new password below, according to the following criteria:

- At least 10 and no more than 60 characters
- Contains at least one uppercase letter, at least one lowercase letter, and at least one number or symbol - can include spaces

Step 3: Sign the Required Documents

Instructions:

- You will now be prompted to electronically sign the required new account documents and can do so by performing the following steps
 - o Select the applicable document to sign (highlighted below)
 - o Review the account information for accuracy
 - o Scroll down to the bottom of the signatures page section
 - o Check **I Agree** and select **Submit** to electronically sign the documents
- All account owners and/or Trustees need to sign the required documents before the account restriction is removed
- At any time you can go to your account by selecting **Go to My Accounts**

Get Started Today: Documents Requiring Your Signature

Please review and sign the documents below by selecting the account you would like to sign for and selecting the I Agree check box to open that account.

If the account has more than one owner, such as a joint account or an account with multiple trustees, then each account owner and/or Trustee must sign these documents before we remove the restriction on the account. If any information is incorrect, please contact your advisor before signing.

Document	Status	Account Name	Account Number	Account Type
Individual Account Agreem...	Awaiting signature	Testaccount1	RA00000001	Individual

Individual Account Agreement for Testaccount1 (RA00000001)

Account Owner Information
 Name: Test Client02
 Address: 3170 Greensboro Drive, 8th floor, McLean, VA 22102
 Email: nooody@foliofn.com
 Tax ID: 123-45-6789

Certifications:
 By signing below, Test Client02, certify under penalty of perjury that:

- The tax identification number shown on this page is the account my true taxpayer identification number and I am a US Person.
- I am not subject to backup withholding as a result of failure to report all interest and dividends, or the Internal Revenue Service (IRS) has notified me that I


Step 4: Account Restrictions Page

Instructions:

- We updated the look and feel of the restrictions page shown below, as well as added a **Sign Now** function to the notes section
- The **Sign Now** function is currently only available for a restriction type associated with **New Account Opening Paperwork** and not other types of restrictions
 - o Other restrictions will only offer the **Print** function
- The **Sign Now** function will bring you to the required signatures page
- Use the **Sign Now** function if you want to sign the required documents without having to log out and log back in

Account Restrictions: Testaccount1 (RA00000001)

Type of Restriction	Inception Date	Reason	Notes	Expiration Date
Complete Restriction	04/09/2013	Awaiting Account Opening Paperwork	We are currently awaiting the required signatures. Select Sign Now to electronically sign the required documents. You can also select Print below to print out the documents, sign them and mail or fax them to us.	

Print  Sign Now

Please Contact Us for further information regarding restrictions on this account.

Additional Information: Email Previews

Client Signature Email with Verification Link (for new clients)

Welcome to Folio Client: Account Signatures Needed

Welcome to **Folio Client**—The Connection to Your Advised Accounts

Your advisor at [Firm Name] has set up your [Account Type Name] account but we need a few minutes of your time to complete the account opening process.

Click on the secure verification link below to electronically sign the required account documents. Have your Folio Client username, date of birth, and social security number available to authenticate your identity.

[Link to Verifications Page](#)

Note: The link above will expire after seven (7) calendar days. If this link expires, contact your advisor to receive a new link.

If you would prefer, you can also electronically sign the required documents at www.folioclient.com using the username and password provided to you by your advisor.

If you have any questions or cannot electronically sign the required account documents, contact your advisor. If you are having trouble logging into your account you can retrieve your username and password at www.folioclient.com.

Client Signature Email without Verification Link (for current clients)

Account Signatures Needed

Your advisor at [Firm Name] has set up your [Account Type Name] account but we need a few minutes of your time to complete the account opening process.

Log in to your account at www.folioclient.com using your username and password to electronically sign the required account documents.

If you have any questions or cannot electronically sign the required account documents, contact your advisor. If you are having trouble logging into your account you can retrieve your username and password at www.folioclient.com.