

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 <u>www.folioclient.com</u> 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.

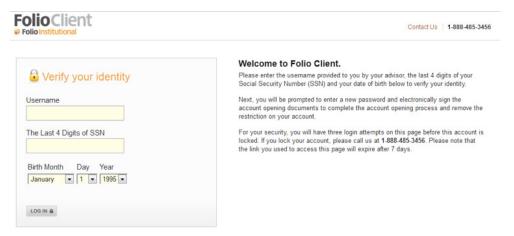
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Step 1: Client Verification

Instructions:

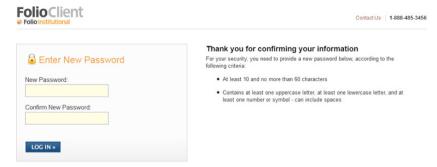
- New clients that have never logged in will receive an email with a verification link from their advisor This link is valid for seven
 (7) calendar days
- When you select the link in the email, you will be directed to the verification page shown below
- We require the following items for our verification: 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



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





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



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
 - 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





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.

