ELECTRONIC SIGNATURE PROCESS

EVO Savings

Advisor Client

The advisor signs in EVO.

In person

Hands over computer to the client for them to access their documents to be signed.

Connects using the option chosen in EVO:

- Enters the code received by text message*
- Answers the security question NEW

Validates the information
Signs using the method chosen in EVO:

- Click to sign
- Onscreen handwritten signature NEW

Remotely

Follows the link received by email to access their documents to be signed.

Connects using the option chosen in EVO:

- Enters the code received by text message*
- Answers the security question NEW

Validates the information
Signs using the method chosen in EVO:

- Click to sign
- Onscreen handwritten signature NEW

* A cell phone is required

Receive confirmation email

Finalize client's file

- Confirm the application in EVO to transmit to head office
- Download or print the signed documents

Access documents

- In My Client Space or
- By clicking the link in the email

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