E-Sign an 8879:

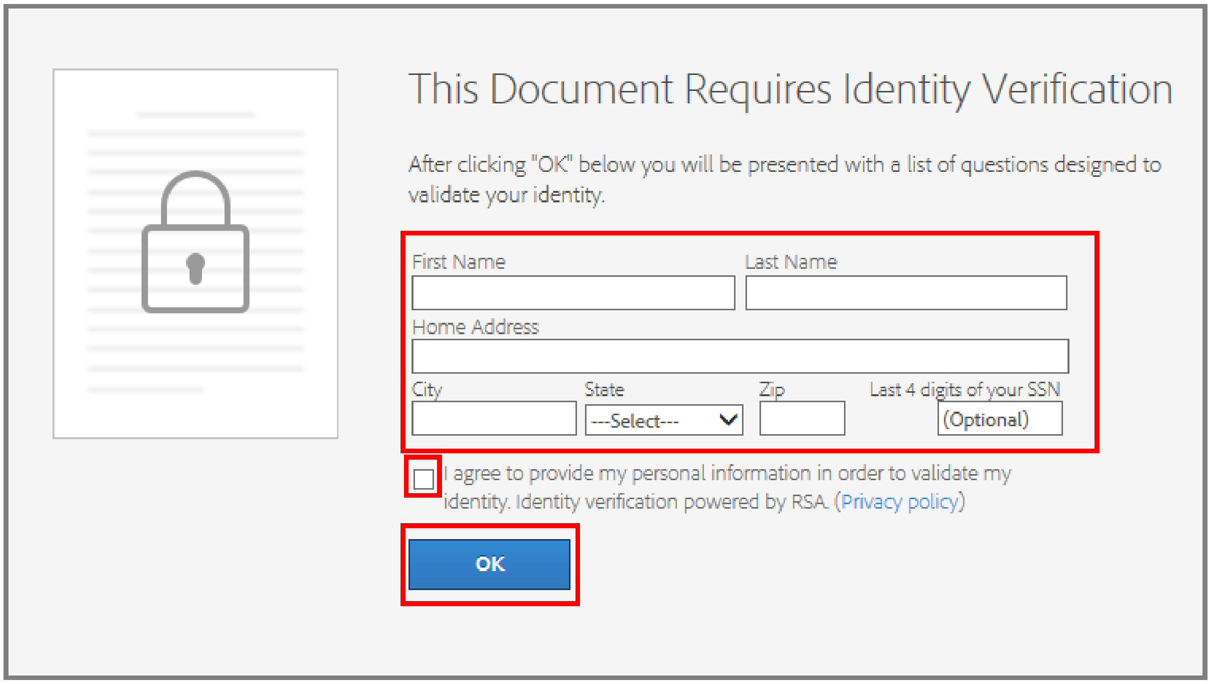
Client Experience

Once the document has been sent, the signer will receive an email notification. The notification will contain a link, which will open a document and request that the client electronically sign.

A. Open notification email and click on highlighted link
B. There will be a padlock icon in the notification, signifying that authentication is required

C. Once the link has been clicked on, the signer will notified that this document requires identity verification and they will need to enter their First Name, Last Name and Home Address
D. They will also need to check the agreement to use KBA box to continue through the process

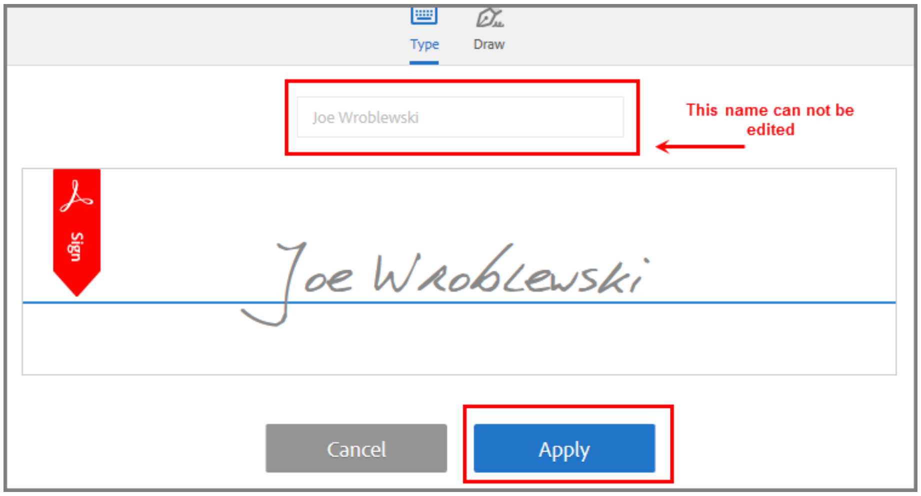
E. Once all required information has been entered, the signer will click “OK”



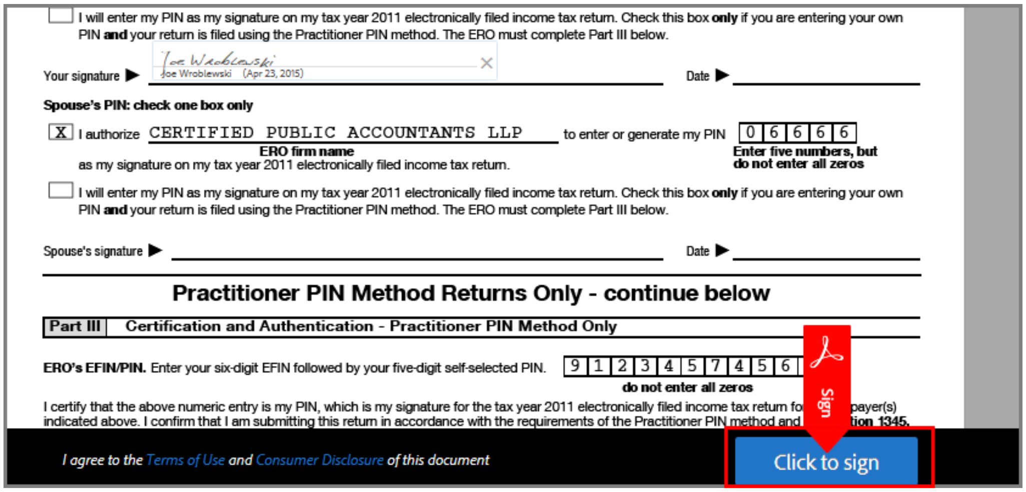
F. Signers must verify their identity by providing some personal information and answering a series of personal questions. LexisNexis queries the credit reporting and other agencies for questions such as:
    1. Which of the following vehicles have you owned or leased?
    2. Which of the following corporations have you ever been associated with?
    3. Based on your background, in which city is 123 Main Street?
    4. Which of the following banks do you have a home mortgage with?
G. There are usually 3 – 5 questions and an unidentified percentage of them must be answered correctly. Once completed, the document will display and the E-Signing process will continue as with any other document.
H. Follow the onscreen instructions – “Click to Sign”

I. Because identity verification was used, the signer will not be able to edit their name when signing

J. Once signed, click "Apply"



K. Once the client has finished applying their signature in all required locations, they simply "Click to Sign"



L. Once the document is completely signed, the signer will receive a final copy. This copy can be accessed by clicking on the "Download Link" in their email notification.

cPaperless

The document listed below has been successfully E-signed by all parties. To obtain your copy of the final signed document, please click on the Download Link below.

Document Name:	8879 John Smith.pdf
Signers:	safesenddemo@gmail.com
Download Link:	https://portal.safesend.com/EchoSignDownload.aspx?id=ee9acd7c-320e-485c-bc0b-0356b86971f9&Signer=safesenddemo@gmail.com

If Signer Authentication was required to sign, you will be prompted to enter the same pin code or last 4 digits of the primary signer's SSN/EIN to download the final signed copy.

Thank you,
cPaperless

To ensure that you continue receiving our emails, please add noreply@signatureflow.com to your address book or safe list.

M. In keeping with IRS compliance, the signer will be required to enter the last 4 digits of their SSN to have access to their final signed copy of the document.