

Updated DocuSign features



To complement our current DocuSign features, the following enhancements will be available as of May 22.

1. When applicable, account applications are now presented before all other ETAS forms in the DocuSign envelope:

This allows for a more improved workflow process when account applications are reviewed and processed, followed by subsequent forms in the envelope that are then processed accordingly.

2. Ability to arrange the order of RIA advisor forms:

Your advisor forms will automatically be placed before the ETAS forms in the envelope. Additionally, your Relationship Manager can now set the order of your advisor forms. For example, an advisor may have two advisor documents – a welcome letter and a checklist. Your Relationship Manager can now set the order so that the welcome letter appears first, followed by the checklist, and ETAS forms.

***** Coming in June 2020:**

Increase the number of workflow recipients:

There are times when additional parties need to review and approve the documents; thus, we have added the ability to add workflow recipients to the process. The DocuSign workflow template will now have more recipients, two more RIA COPY and RIA SIGN options before the client signs and one more RIA COPY and RIA SIGN option after the account owner signs, for a total of 7 RIA Copy/Sign recipients.

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Send Forms for eSignature

eSignature Steps		ENTER RECIPIENTS		
	Recipient	Name	Email	Phone Number *
Select Account Forms	Creator	Stella Boulter	sboulter@trustamerica.c	
Select Advisor Forms	RIA First Copy			
Select Proposals	RIA First Reviewer			
Upload Other Forms	RIA Second Copy			
Enter Recipients	RIA Second Reviewer			
Confirmation	RIA Third Copy			
	RIA Third Reviewer			
	First Client	TCA Auto 5/12/2020 4_C		
	Spouse of First Client			
	Second Client			
	Spouse of Second Client			
	Third Client			
	RIA Fourth Copy			
	RIA Fourth Reviewer			
	RIA Fifth Copy			
	RIA Fifth Reviewer			
	RIA Sixth Copy			
	RIA Sixth Reviewer			
	RIA Seventh Copy			
	RIA Seventh Reviewer			
	TCA Copy			
	TCA Reviewer			

* Phone number must support text messages.

Cancel Send

If you are interested in a demonstration of these features or have any questions, please let your Relationship Manager know.