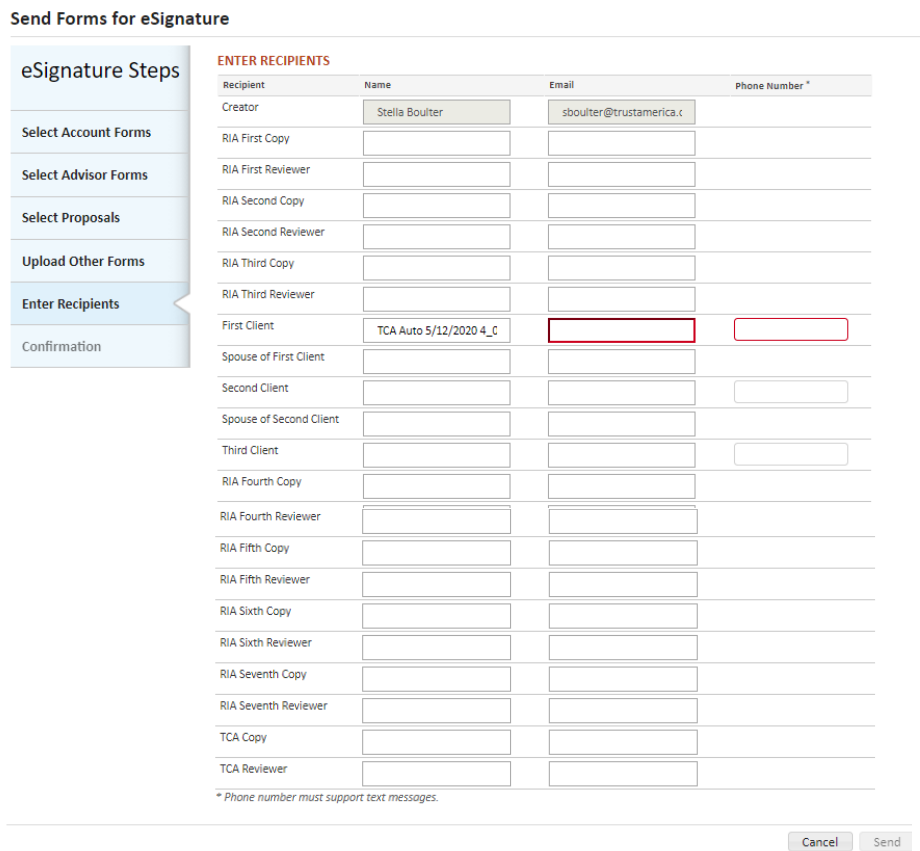
Updated DocuSign features

To complement our current DocuSign features, the following enhancements will be available on June 19, 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.



As a reminder, previously released:

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.

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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.

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