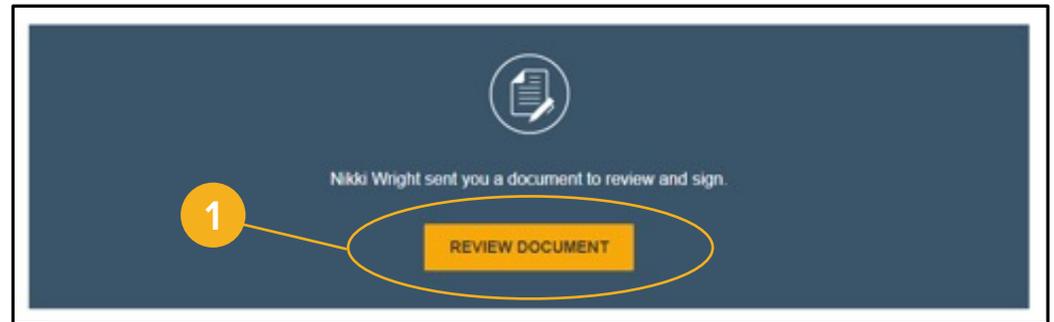


DocuSign Electronic Signature Guide

1 Review the DocuSign Email

You will receive a email from Alterra, open the email and review the message from the sender.

Select **REVIEW DOCUMENT** to begin the signing process.



2 Fill out Security Request Form

Complete the **Security Requests from Sender** form. This is to verify your identity for your security.

You'll be prompted to answer multiple choice questions that confirm your identity such as previous addresses, vehicles you owned, etc. These are identity questions that are not easily found if your identity is compromised.

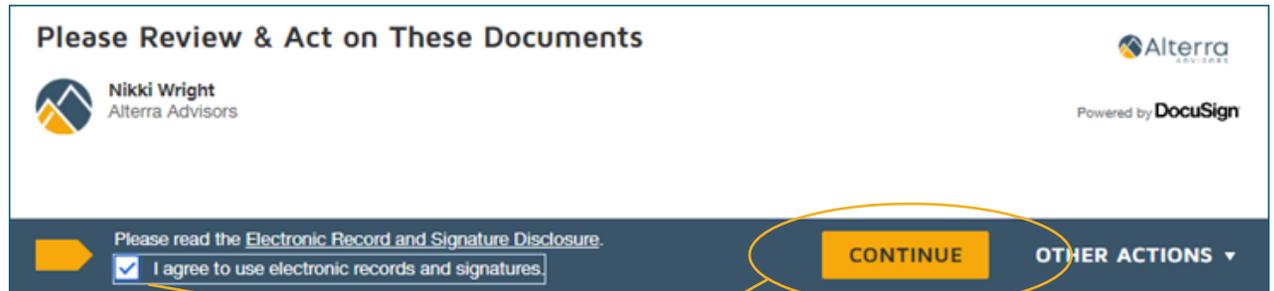
A screenshot of the "Security Requests from Sender" form. The form title is "Security Requests from Sender" and it features the "Nikki Wright Alterra Advisors" logo. Below the logo is a section titled "ID Check - Personal Information" with a sub-instruction: "Enter your home address. This information, along with your name will be used to generate a list of questions to verify your identity." The form is divided into "Required Information (Home Address)" and "Optional Information". The required fields include: Name (pre-filled with "nikki wright"), Street 1, Street 2, City, State (a dropdown menu), and Zip. The optional fields include: Last 4 digits of SSN, and Date of Birth (with a format of mm / dd / yyyy). At the bottom of the form, there is a red warning message: "You must enter required and valid information before you can continue." and a "CANCEL" button.

DocuSign Electronic Signature Guide

3 Agree to Sign Electronically

Review the consumer disclosure, and select the checkbox **I agree to use Electronic Records and Signatures**.

Select **CONTINUE** to begin the signing process.

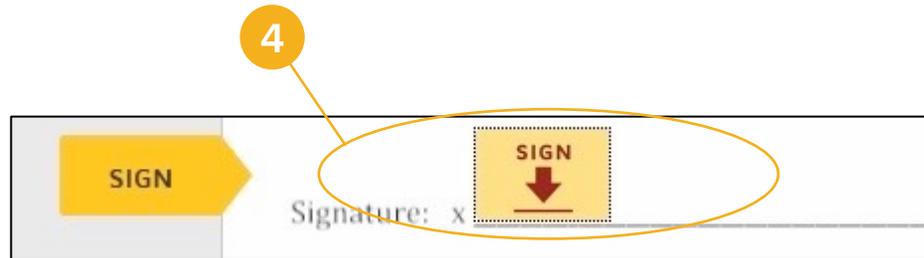


4 Start the Signing Process

Review the documents by scrolling or using the page thumbnails in the right-hand navigation pane.

When you're ready to sign, select the **START** tag on the left to begin. You are taken to the first tag requiring your action. You may be prompted to fill in information fields as well as sign.

Select the **SIGN** tag.



DocuSign Electronic Signature Guide

5 Adopt Your Signature

You are asked to Adopt Your Signature.

Verify that your name and initials are correct. If not, change them as needed.

Select **ADOPT AND SIGN** to adopt and save your signature information and return to the document.

6 Confirm signing

When you finish clicking all signature tags in the document, confirm signing by selecting **FINISH**.

A message appears stating that you have completed your document.

Congrats, you have successfully signed your documents!

Once all parties have signed, you will receive an additional email with the completed documents. You will be able to download the signed documents for your records at that time. You can also reach out to your advising team at any time for previously signed documents.

Adopt Your Signature

Confirm your name, initials, and signature.

Full Name Michael P **Initials** MP

Select Style Draw

Preview

DocuSigned by:
Michael P
02367A3E9D33485...

DS
MP Change Style

By clicking Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

QUESTIONS?

Reach out to your Client Care to help with any questions you have using DocuSign.