# DocuSign with Standard Life

Introducing electronic signatures and online submission of new business applications.

For financial advisers only

# How to register

Standard Life

1 Provide your email address, full name and company name to salessupportroi@standardlife.ie

2 Our team will set you up as a user and will send you an activation link along with a password

3 Click the link to activate your account

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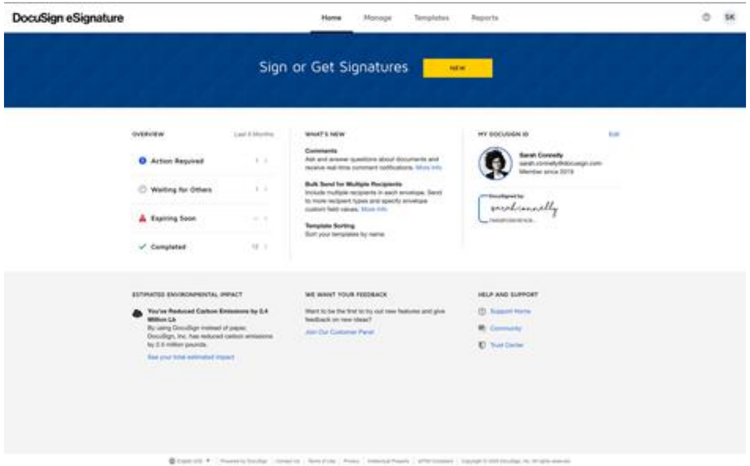
# New business submission step by step

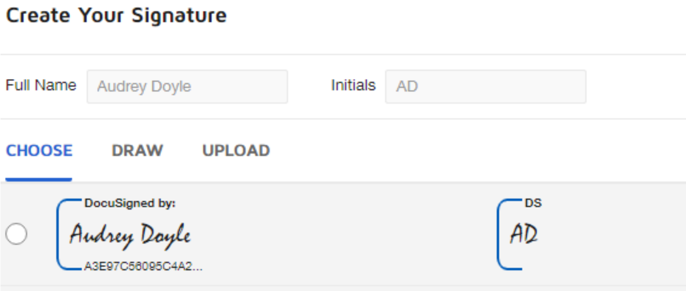
### Step 1

Once you have registered your account you will see the home page




### Step 2

You will be asked to create/upload your signature



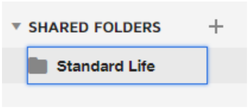
# New business submission step by step

**Step 3**

Move to templates to choose the application you wish to submit


**Step 4**

Click shared template on side navigation this will open a listing of the Standard Life application forms

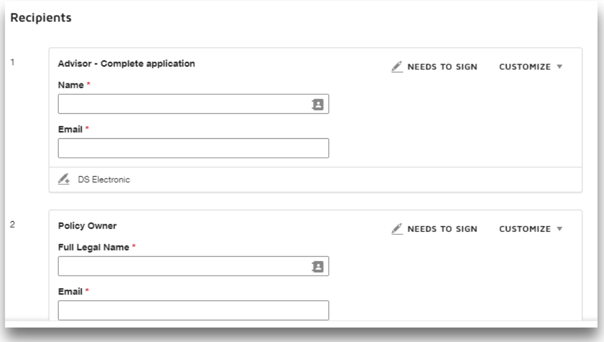



**Step 5**

Click on the “USE” Button


**Step 6**

Apply signatories required. Delete any signatories not needed for the flow by clicking the “x” button.

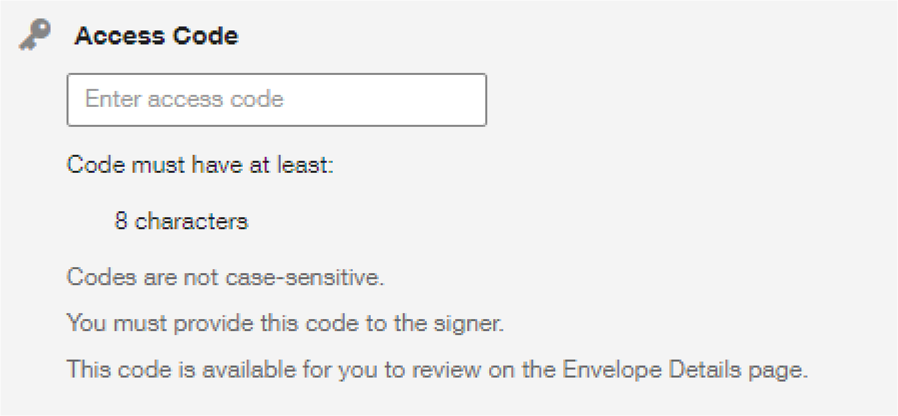


# New business submission step by step

**Step 7**

For each signatory you will need to add a password code of your choice.

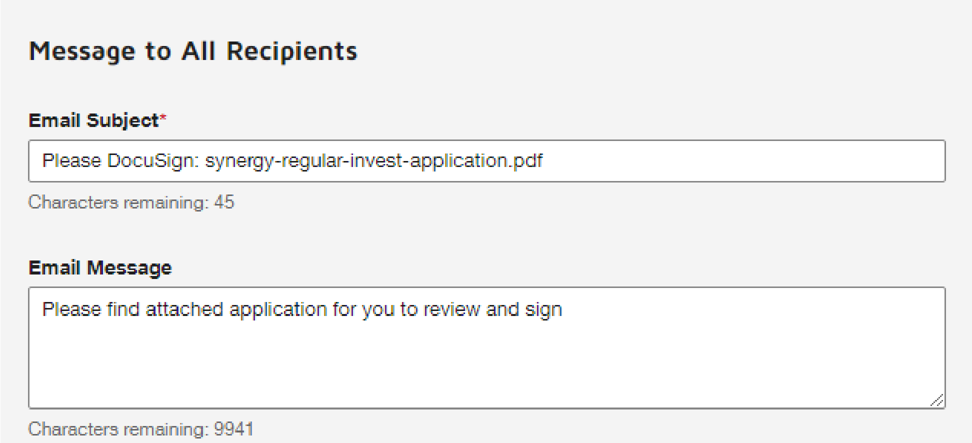
This must be sent to the customer in a separate format for security before they can view their documents to sign.



# New business submission step by step

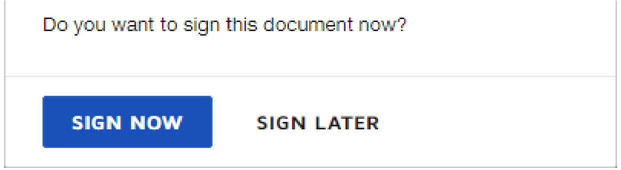
**Step 8**

You can include a personalised message to all recipients if required.




**Step 9**

Once you have all the email addresses noted click “send ” and “sign now”



# New business submission step by step

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**Step 10**

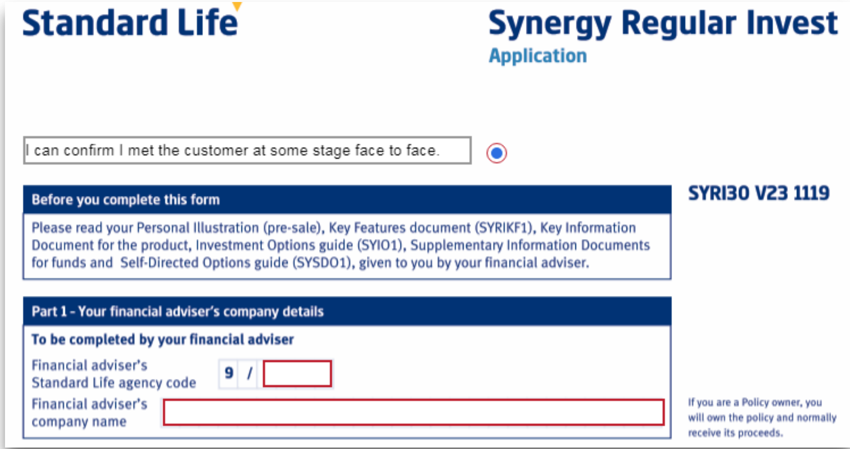
Complete all the mandatory fields marked red and sign the form and click “finish”

**Step 11**

The file will go by email immediately to the first recipient noted in the signatory flow.

**Step 12**

Each signatory will receive an email and must insert the secure code to view.



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**Synergy Regular Invest**

Application

I can confirm I met the customer at some stage face to face.

SYRI30 V23 1119

**Before you complete this form**

Please read your Personal Illustration (pre-sale), Key Features document (SYRIKF1), Key Information Document for the product, Investment Options guide (SYIO1), Supplementary Information Documents for funds and Self-Directed Options guide (SYSDO1), given to you by your financial adviser.

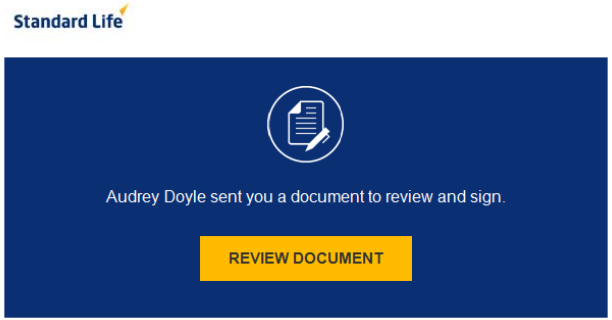
**Part 1 - Your financial adviser’s company details**

**To be completed by your financial adviser**

Financial adviser’s Standard Life agency code 9 /

Financial adviser’s company name

If you are a Policy owner, you will own the policy and normally receive its proceeds.



# New business submission step by step

**Step 13**

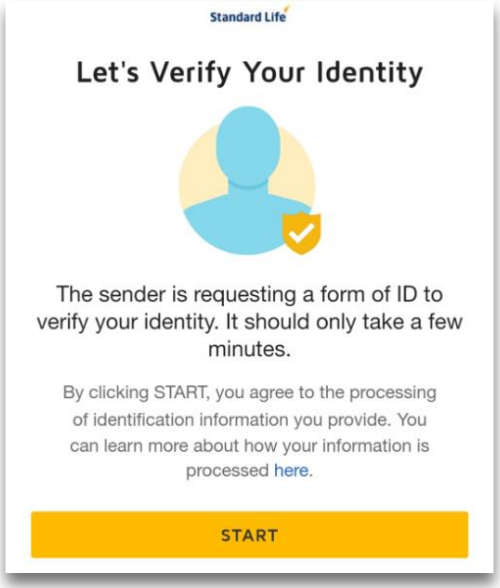
Your customer will be asked to upload ID in the form of passport or driver licence.

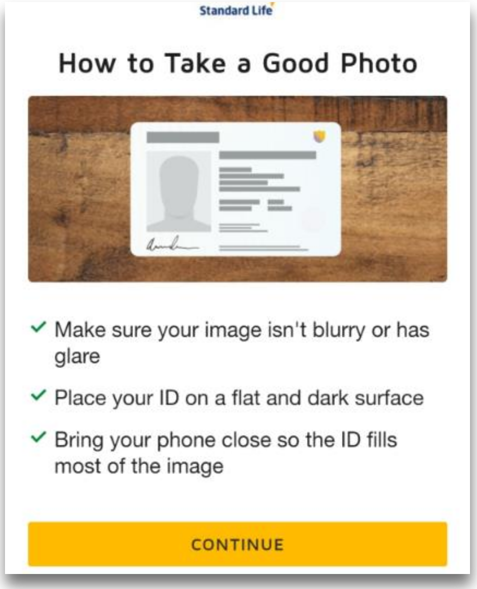
**Step 14**

Once ID is verified the customer can review and sign the application.

**Step 15**

The application will then be sent to each policy owner/employer or trustee where applicable to sign.



# New business submission step by step

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### Step 16

When all required signatories have signed, the file will be returned to the adviser for final review, signature and any further attachments. Click “complete” to finish the process.

### Step 17

When all signatories are completed, the file will be sent directly to our new business mailbox and to our stream scanning system ready for process. A copy will also be sent to the adviser to review. This will be stored as completed within the inbox of DocuSign.

If you have any queries in relation to DocuSign please contact

**salessupportroi@standardlife.ie**

# Thank You

Standard Life

There's a lot to look forward to