

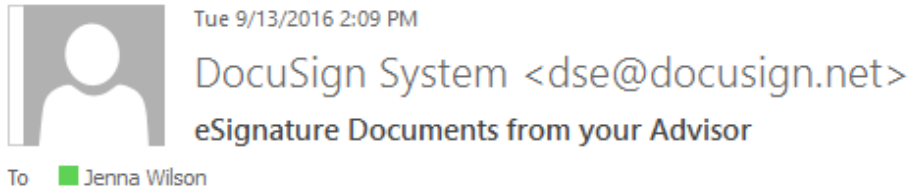
eSignature Instructions

Please follow the steps below to sign a document using an eSignature.

1 Receive Email from DocuSign System



Click "View Documents" circled in the image below.



Please review and sign the document(s) from your Advisor

Hello JENNA C WILSON,

Please review the document below

You are receiving this e-mail because there is an important account document for your Fidelity Account or your relationship Advisor that requires your review and signature. Please contact your Advisor with any questions.

Before you review and sign your document, as a security measure, you will need to correctly answer three questions to verify your identity. In the event of an unsuccessful authentication, you will have a second opportunity to complete the process. If you are unsuccessful after the second attempt, please contact your advisor for assistance.

Carefully review every page of your document before signing. If for some reason, any required information is missing, you will be prompted to enter it. Note that for new account opening forms, some account features may have been preselected. Please review these selections and make any modifications necessary. These features may include, but are not limited to, Asset Movement Authorization and Document Redirection for your Fidelity account.

At the first signing event, you will adopt your signature and click the Sign Here link. You only need to adopt your signature once. You will have several signatures to choose from, and it does not matter which signature you use. If you are signing on a mobile device, you can simply "draw" your signature using your finger or a stylus. In some cases, you will be asked to attach additional supporting documentation.

Upon completion, you will be prompted to confirm your signing. You will also be notified when the documents are fully executed. Your advisor will review and release the documents after you have completed the process.

Select the View Documents link below to review and sign your document.

[View Documents](#)

2 Enter your Email Address and SSN



The link from your email will take you to a web browser and ask for your Home Address and the last 4 digits of your Social Security Number (see image below). Fill out the information and click "Next".

The screenshot shows a DocuSign interface with a green header. The main content is a white box titled "Security Requests from Sender". It includes a "From:" field with a profile icon and the text "Advisor Account Services". Below this is a section for "ID Check - Personal Information" with a message: "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 contains several input fields: "Name: JENNA C WILSON", "Street 1", "Street 2", "City", "State" (a dropdown menu), and "Zip". To the right of these fields is a field for "Last 4 digits of SSN". At the bottom of the form, there is a red warning message: "You must enter required and valid information before you can continue." and two buttons: "CANCEL" and "NEXT", with the "NEXT" button circled in red.

3 Answer Identification Questions



Next you will be asked to answer identification questions to confirm your identity. Answer these questions and choose "Submit Answers" (see image below).

The screenshot shows the same DocuSign interface. The "Security Requests from Sender" section is followed by "ID Check - Identification Questions". A message states: "These questions are being generated as a means of an identity check requested by the document sender. None of this information is provided to the document sender or to anyone except you." There are three sets of questions, each with radio button options: "What month was 'Jordan Mcglade' born in?" (February, September, May, November, July, None of the above or I am not familiar with this person), "What month was 'Austin Wilson' born in?" (January, September, March, November, May, None of the above or I am not familiar with this person), and "According to your driver's license, approximately how tall are you?" (5 feet and 0 inches, 5 feet and 9 inches, 5 feet and 3 inches, 6 feet and 1 inches, 5 feet and 6 inches, My height is not reported as any of these values). A red message says "Please answer all of the questions provided." At the bottom, a "SUBMIT ANSWERS" button is circled in red.

4 Agree to Terms of DocuSign



Check the circled box (see image below) and choose "Continue" to move forward with signing.

Please Review & Act on These Documents



Advisor Account Services
Advisor Account Services
Please review the document below



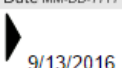
By CHECKING, I certify that I have read, understand and agree to the terms and conditions in the following link concerning use of Electronic Records and Signatures OTHER ACTIONS ▾

5 Sign Document □

Scroll down until you see the space for your signature as in image 1 below. Click on the yellow box. A pop-up (image 2) will ask whether you would like to sign using a font or if you would like to sign on your own (using a smartphone or touch screen device). Choose your preference then click "Adopt and Sign".

children of a beneficiary), and therefore may end up including individuals not yet born or adopted.

The IRA Owner must print name, sign, and date.

Print IRA Owner Name	
JENNA C WILSON	
IRA Owner Signature	Date MM-DD-YYYY
 	
	9/13/2016

Important Information Regarding Complex/Customized Beneficiary Designations

Subject to the requirements outlined below, if you wish to make a beneficiary designation for your IRA that is more complex than what can be provided on this form, you may attach a customized beneficiary designation to this form. Consult with your attorney and/or tax advisor for assistance in determining a customized beneficiary designation that is appropriate for you.

Adopt Your Signature ×

Confirm your name, initials, and signature.

Full Name

JENNA C WILSON

Initials

JCW

Select Style

Draw

FONT **SMARTPHONE**

PREVIEW

[Change Style](#)

DocuSigned by:

BED67F23BEFB479...

DS

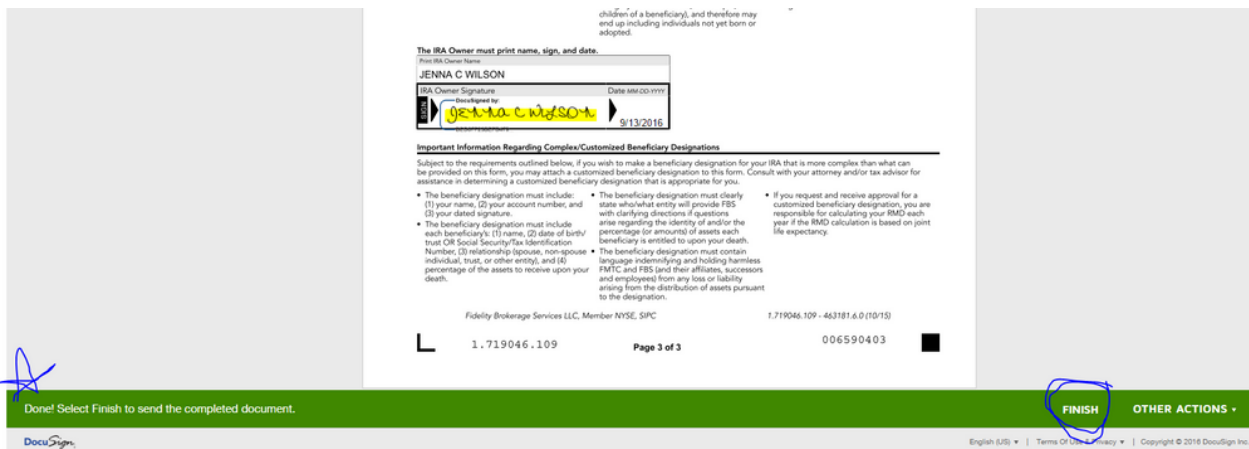

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN

CANCEL

6 Complete eSignature □

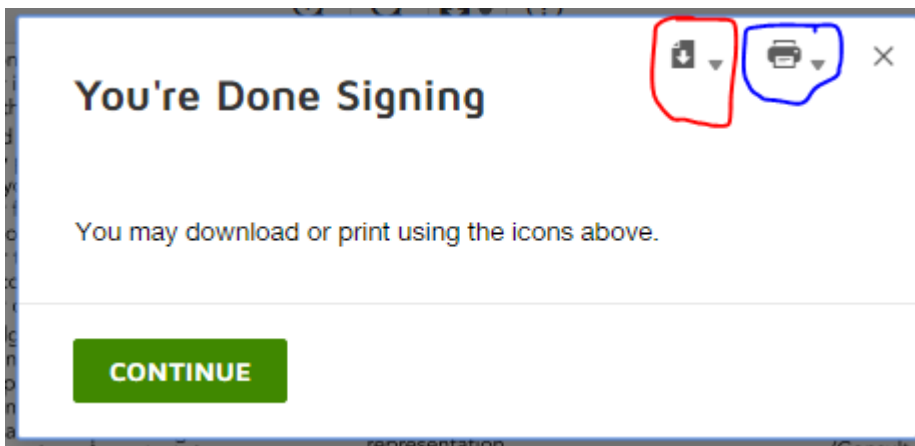
You should now be able to see your eSignature as is highlighted in the image below. Choose "Finish" if you would like to submit your signature.



7 Download or Print (Optional)



You download (red) or print (blue) your signed document if you would like to keep it for your records.




8 DocuSign Confirmation



The page below will show to tell you that signing using your eSignature was successful.

DocuSign

You have successfully signed your document using DocuSign



Now that you have seen how easy it is to sign a document with DocuSign, try it for yourself. Join more than 40 million DocuSigners who sign and send documents in minutes. Get your 30-day FREE Trial today!


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Finish signing your document anywhere, anytime and on any device.

KEEP BUSINESS DIGITAL™



For individuals, small and medium business or enterprise, we have a product to match.

Trusted by millions of users worldwide




LinkedIn **salesforce** **RE/MAX** **MCKESSON** **YAHOO!**

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9 Confirmation Email



You will receive an email confirmation letting you know your signature was received. Thank you for using DocuSign!

 Reply  Reply All  Forward  IM



Tue 9/13/2016 2:28 PM

DocuSign System <dse@docusign.net>

Completed: eSignature Documents from your Advisor

To  Jenna Wilson

Your document has been completed

JENNA C WILSON,

All parties have completed the envelope 'eSignature Documents from your Advisor'.

To view, download or print the completed document click below.

[View in DocuSign](#)