

Purpose

This document outline how to create and sign forms digitally.

Which forms can be digitally signed?

- *Application Form - Individuals (UK & International)*
- *Application Form - Trust and Company (UK & International)*
- *Application Form - Discretionary (South Africa)*
- *Application Form - Execution Only (South Africa)*
- *Application Form (Endowment) - Discretionary (South Africa)*
- *Application Form (Endowment) - Execution Only (South Africa)*
- *ISA Application Form*
- *ISA Transfer Form* (Note the existing ISA provider may still require a wet inked completed form)
- *Payment Instruction Form*
- *Account Closure Form*
- Form W-8BEN
- Form W-8 BEN-E

How to create a digital signature?

1. Where it states: "sign here", click in the box
2. Three options will appear, and you should select "Configure New Digital ID".
3. Select "Create a new Digital ID"
4. Select "Save to File"
5. Please capture, at minimum, the "Name" and "Email Address", then select "continue".
6. Create a password and re-input the password in "confirm the password" (fields highlighted in below)

7. Select "save" - the below will appear:

8. Select “create” - a box will appear (similar to the below)

Sign as "Driena Massyn"

Appearance: Standard Text

Create

Driena Massyn

Digitally signed by Driena Massyn
Date: 2019.03.29 13:14:04 +02'00'

[View Certificate Details](#)

Review document content that may affect signing

Review

Enter the Digital ID PIN or Password...

Back Sign

9. Draw the signature in the box, and once complete, select “save”.

Customize the Signature Appearance

Text Draw Image None

Digitally signed by
<your common name here>
Date: 2019.03.29 13:15:41 +02'00'

[Click here to Draw](#)

Include Text

☒ Name ☐ Distinguished Name
☒ Date ☐ Adobe Acrobat Version
☐ Location ☒ Logo
☐ Reason ☒ Labels

Text Direction

Auto

Digits format

0123456789

Preset name

Cancel Save

10. Enter the password and select “sign”



The screenshot shows a digital signature window titled "Sign as 'Driena Massyn'". It includes a signature, the text "Digitally signed by Driena Massyn", and the date and time "Date: 2019.03.29 13:17:50 +02'00'". There are buttons for "Create", "Edit", "Review", "Back", and "Sign". A red box highlights the password entry field labeled "Enter the Digital ID PIN or Password...".

11. A box will appear to save the signature to your computer.
12. Once saved, the signature should populate in the “sign here” section of the form. If it does not automatically, then select into the “sign here” box and it should appear.

How to sign a form digitally?

1. Where it states: “sign here”, click in the box and a new screen will appear
2. Enter the password captured and click “sign”
3. The digital signature will reflect in selected box