

Purpose

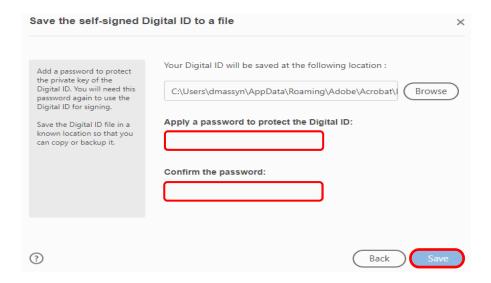
This document outline how to create and sign forms digitally.

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)

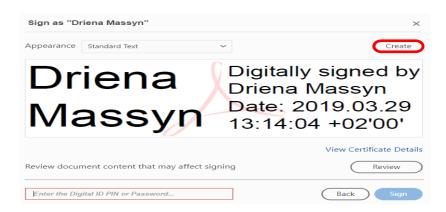


7. Select "save" - the below will appear:

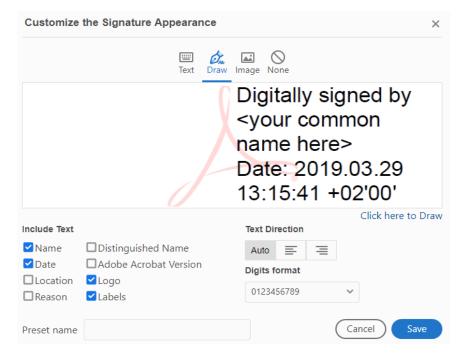




8. Select "create" - a box will appear (similar to the below)



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





10. Enter the password and select "sign"



- 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