



EQUITABLE

How to set up DocuSign

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1

In order for a BGA to use DocuSign, they must have their selling agreement updated with an Addendum regarding the usage of the platform.

- To do this, please contact your RVP. Your RVP will reach out to Lynn Bonczek to get the process started. Lynn.Bonczek@Equitable.com, (704) 341-6402
- Lynn will need a key contact at the BGA to get the selling agreement updated.

2

Once completed, if the BGA already has an account with DocuSign, they are ready to move forward.

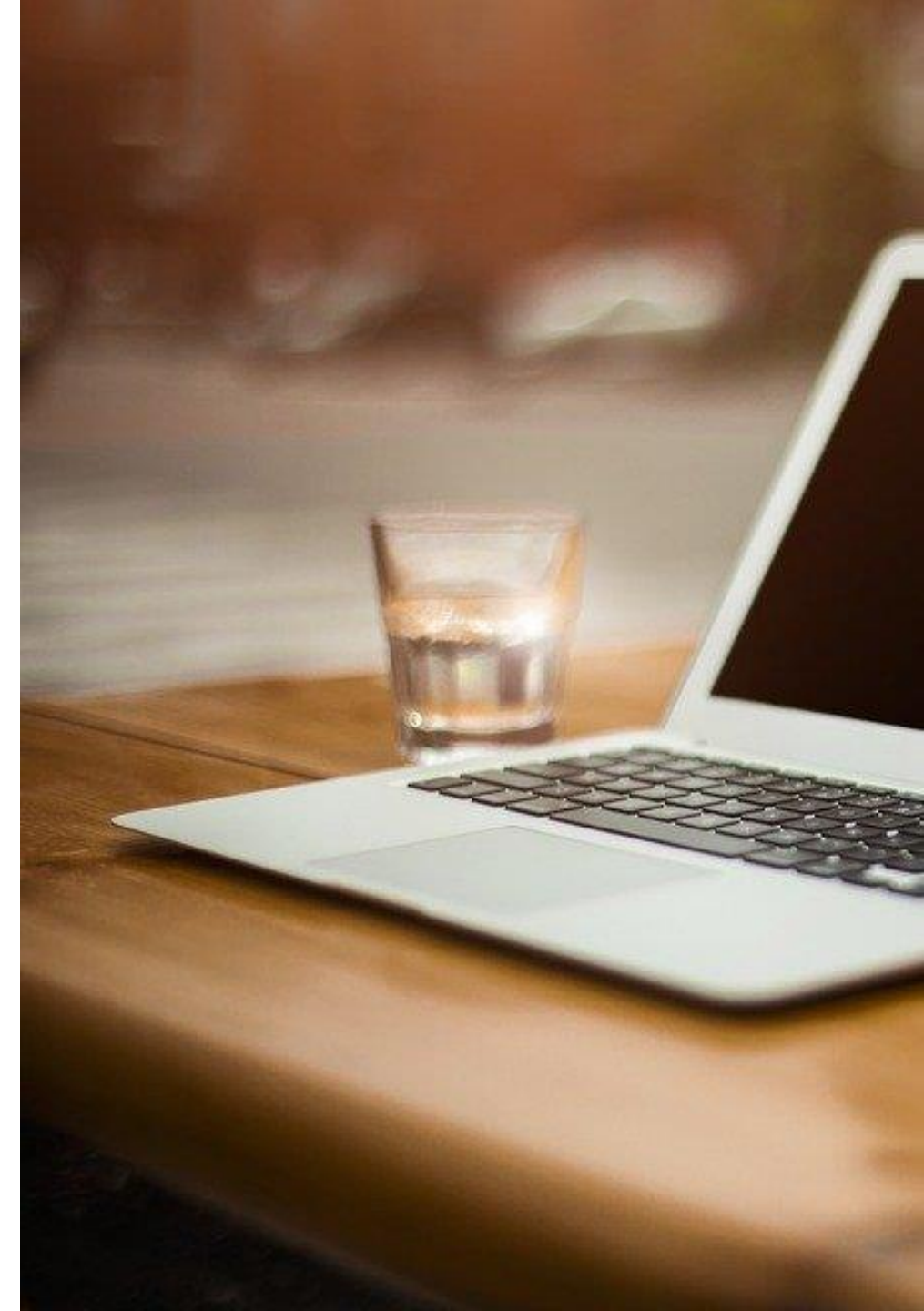
3

If they do not, they will need to contact DocuSign and get set up. Equitable does not own the DocuSign account. The BGA does. It would be at the cost of the BGA.

Why is this important?

Using electronic signature software, such as **DocuSign, SignEasy or SignX**, allows you to upload the .pdf format for:

- Licensing paperwork
- Applications
- Miscellaneous new business and underwriting forms
- Illustrations
- Delivery requirements
- Designate where you'll need your client's signature
- Send via DocuSign for their electronic signatures
- Return to us for processing once received back from the signing parties



How to use DocuSign | Step-by-step tutorial



<https://www.youtube.com/watch?v=vpHz1cuqaPE>

To sign-up for DocuSign



<https://www.docusign.com/products-and-pricing>



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