# Steps to obtain access to DocuSign for Financial Professionals & their assistants

## 1 Complete the Required DocuSign Training on EAVU

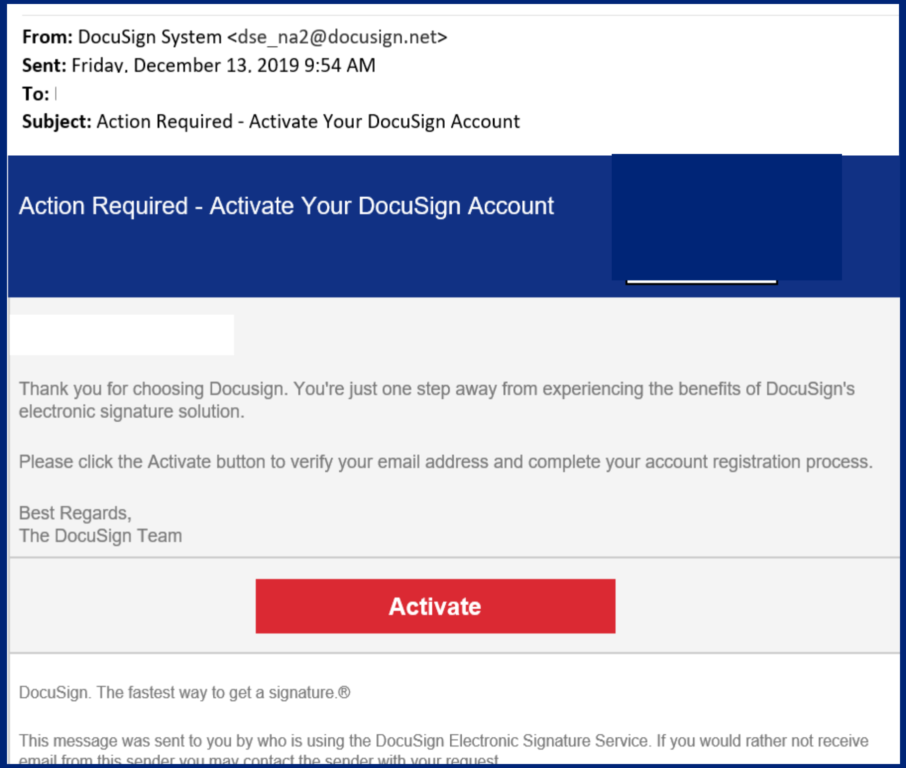
- All Financial Professionals and their assistants will have access to the Training.
- The Wealth Management Project Management Team will pull daily reports from EAVU and provide access to DocuSign based on course completion.

The training path is as follows:

- **EAVU > Course Catalog > Practice Management > Technology for Financial Professionals > DocuSign Training**

## 2 Activate your DocuSign Account

- You will receive an email from DocuSign to activate your account.
- Click on the "**Activate**" action button in the email and follow the directions to set up your credentials.
- Then, Log out.
- Email: Daniel.Zubrowski@equitable.com if you and your assistant should have the Shared Envelope Functionality.



**From:** DocuSign System <dse_na2@docusign.net>
**Sent:** Friday, December 13, 2019 9:54 AM
**To:**
**Subject:** Action Required - Activate Your DocuSign Account

Action Required - Activate Your DocuSign Account

Thank you for choosing Docusign. You're just one step away from experiencing the benefits of DocuSign's electronic signature solution.

Please click the Activate button to verify your email address and complete your account registration process.

Best Regards,
The DocuSign Team

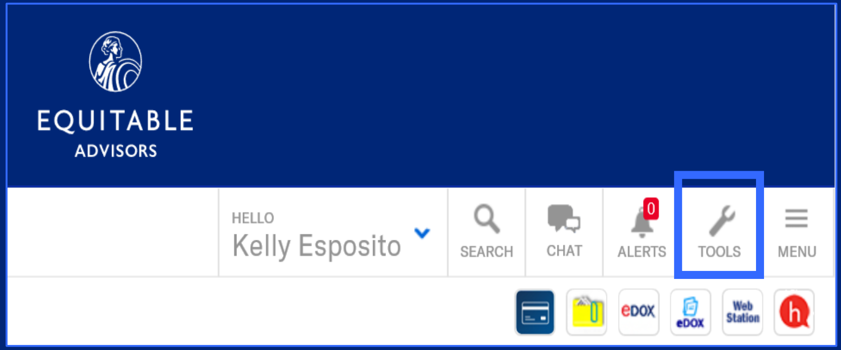
Activate

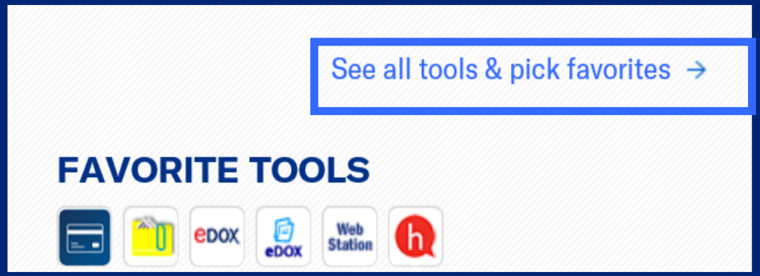
DocuSign. The fastest way to get a signature.®

This message was sent to you by who is using the DocuSign Electronic Signature Service. If you would rather not receive email from this sender you may contact the sender with your request.

## 3 Log into Equitable.com

- Click on "**Tools**".
- Click on "**See all tools & pick favorites**".
- Scroll down to "**D**" and drag "**DocuSign**" to your favorites.
- Launch "**DocuSign**".
- Enter your equitable.com email and the password you created.
- If you have a DBA email, that email will be used.




DocuSign