eSignature
Client Reference Guide

One of the benefits of partnering with LPL Financial is their relationship with Docusign which provides the ability to sign and submit several forms via a secure website accessed by email. Please follow the steps below to access and complete the signing process.

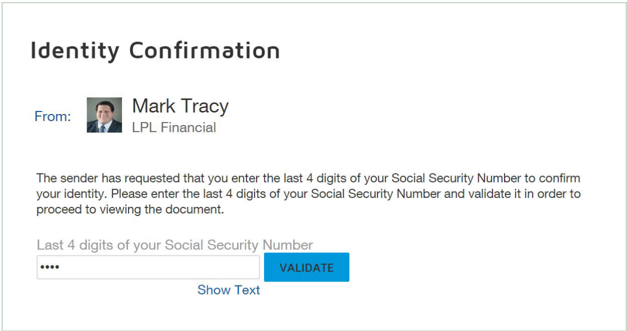
Step 1

Someone on our team will send an email.
Click "View Documents" to access the secure website.

Step 2

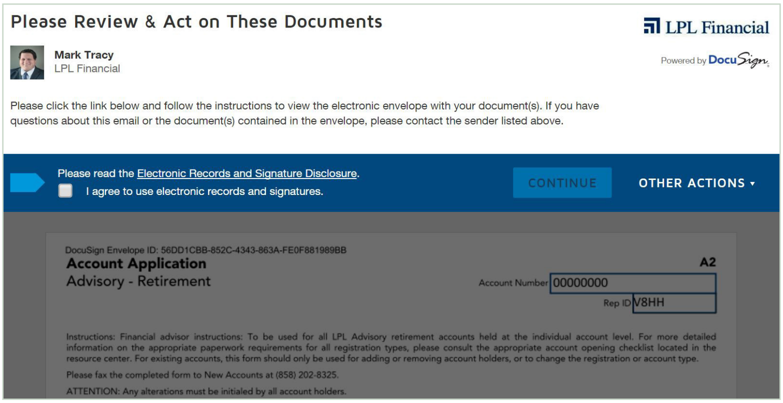
Please enter the last four digits of your Social Security Number and click "VALIDATE".

Please Note: Some forms may require additional validation, such as, the answering of security questions.



Step 3

After reading and agreeing to the "Electronic Records and Signature Disclosure", **click on the checkbox next to where it reads "I agree to use electronic records and signatures."** Then, click "CONTINUE".



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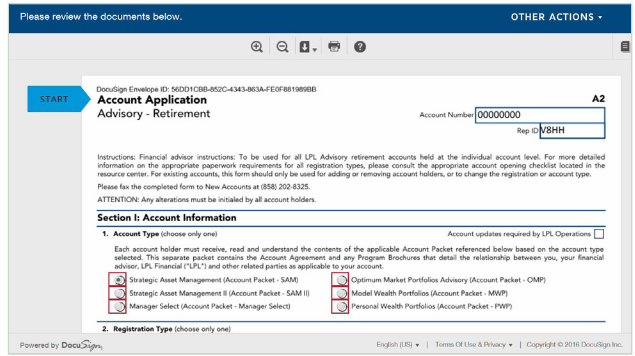
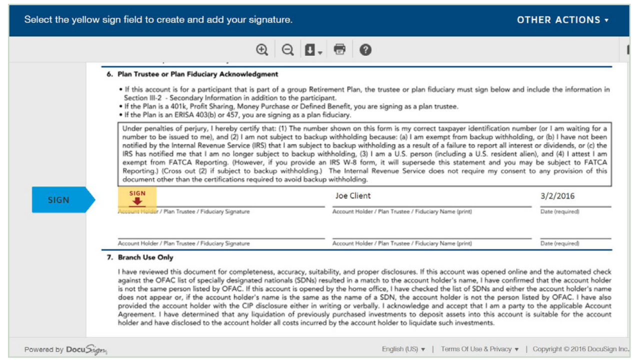
Step 4a

Review all the information for accuracy or add any missing information. Note: Any changes to the forms must be completed by the primary account holder before signing.
After reviewing the form, to be guided to the signature area(s) click "START"



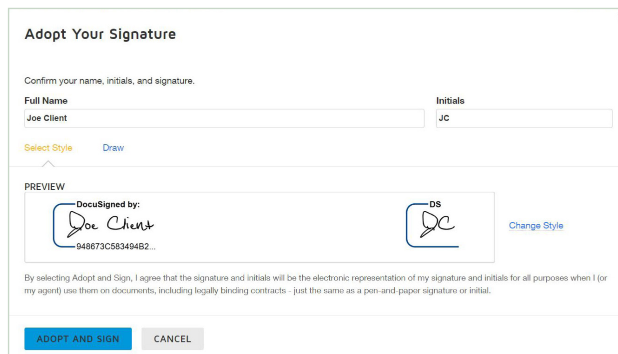
Step 4b

To sign the form click "SIGN" (SIGN)



Step 4c

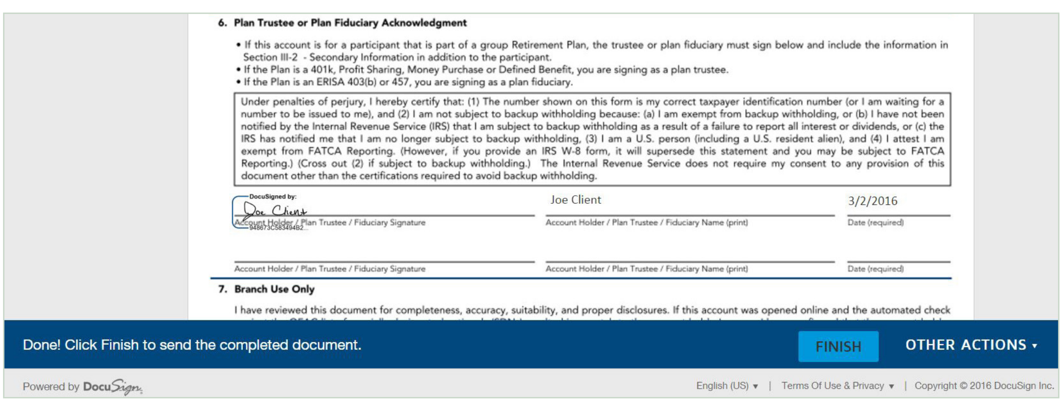
At this point, you will be asked to "Adopt Your Signature". Click "Change Style" and then click on the signature that best suits you. When finshed, click "ADOPT AND SIGN".



Step 5

Once all the forms have been signed, a blue bar will appear at the bottom of the window. Click "FINISH".

Please Note: "FINISH" must be clicked to complete the process.



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