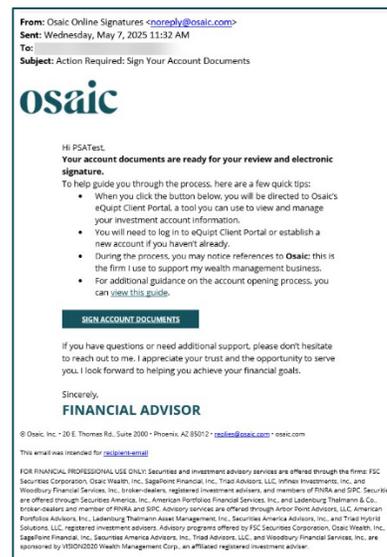


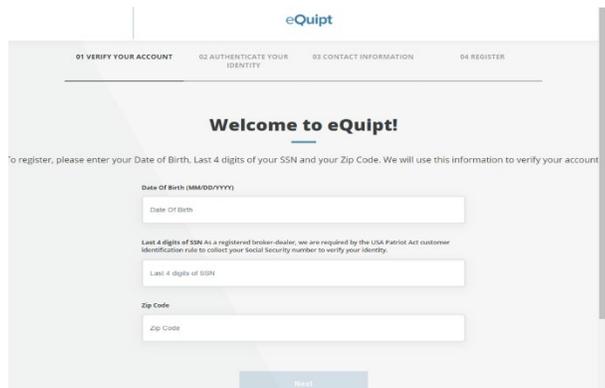
e-Signature for new account documents

A step-by-step guide on how to e-sign your documents

1. You will receive an email from noreply@osaic.com. Click the **SIGN ACCOUNT DOCUMENTS** button in the invitation and proceed to e-sign the documents.



2. Next, you will be directed to the **eQuipt Client Portal** welcome screen, where you will confirm and enter your date of birth (MM/DD/YYYY), last 4 digits of your social security number, and your zip code. Then, click **Next**.

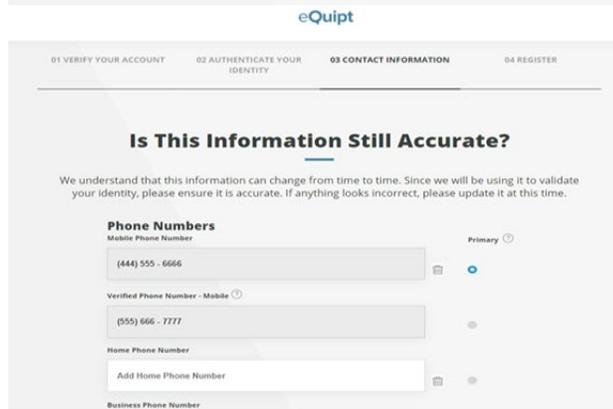


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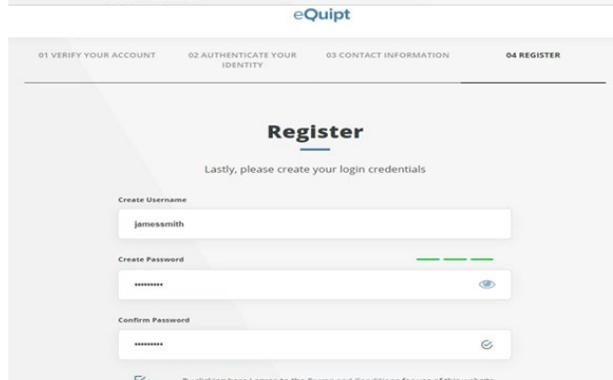
3. Your next screen is a “multi-factor authentication,” which is an additional safeguard to ensure your identification is secure. You can select to receive a one-time passcode through text message or phone call.



4. Once the multi-factor authentication is complete, you will be asked to confirm your contact information.

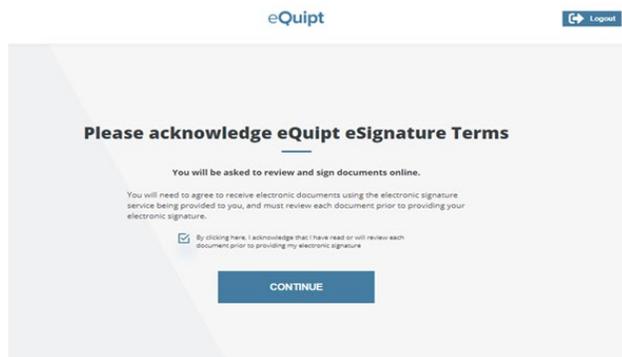


5. Once you have confirmed your contact information, you will now register for your Client Portal by creating a Username and Password.

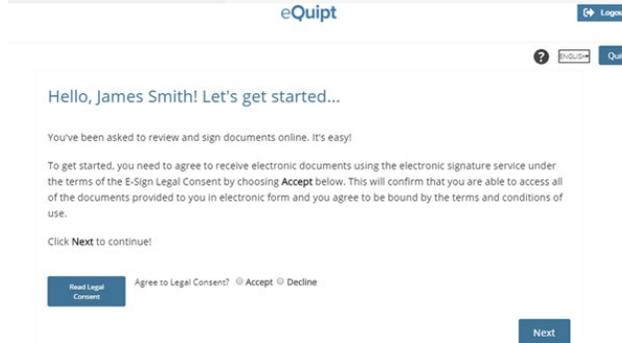


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- If you consent to our system's (eQuipt's) eSignature terms, select the box and click **Continue**.



- Next, you be asked to agree to an e-Sign Legal Consent. You can review the terms by selecting the **Read Legal Consent**. If you agree to legal consent, select the **Accept** radial button, and then select **Next**. (If you do not agree, you can select **Decline** and this will end the process. Please contact your financial advisor.)

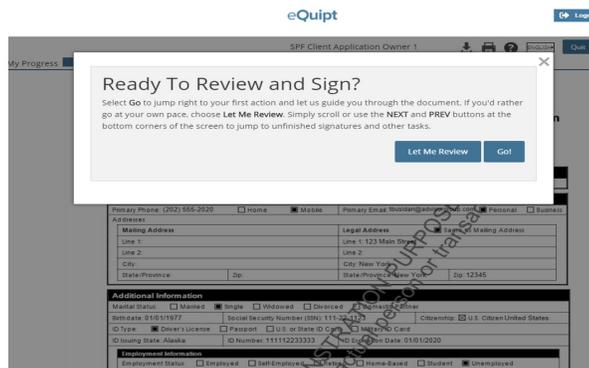


- Next, you will create a digital signature. You have the option of choosing the default style or creating a custom signature.

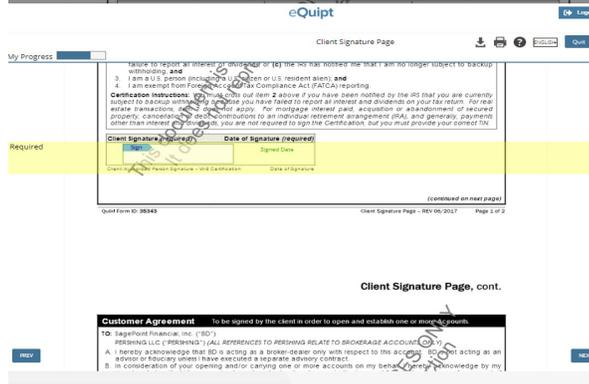


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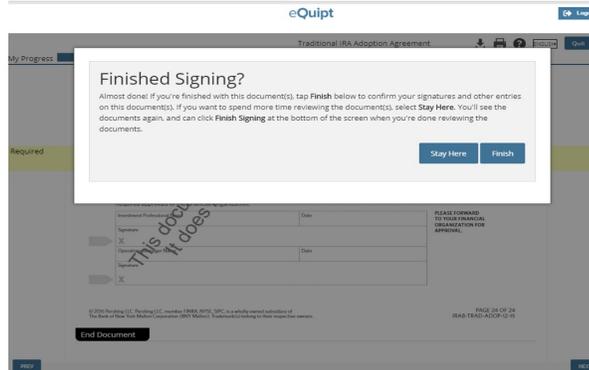
9. Once you have created your signature or chosen your style, you will see a **Ready To Review and Sign** pop-up, indicating that you have documents ready for your signature.



10. You will be guided through the signature process step-by-step with highlights on where your signature and/or initials are necessary. Select the box to insert your signature.



11. When you have gone through each of the highlighted fields, you will be asked if you would like to finish signing or stay on the page to continue to review the documents. Select **Stay Here** if you would like to stay on the page to review the documents. Select **Finish** to complete the process.



Congratulations! You have completed the e-Signature process!

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