



NASSAU

Client Signature User Guide

Version 09-20

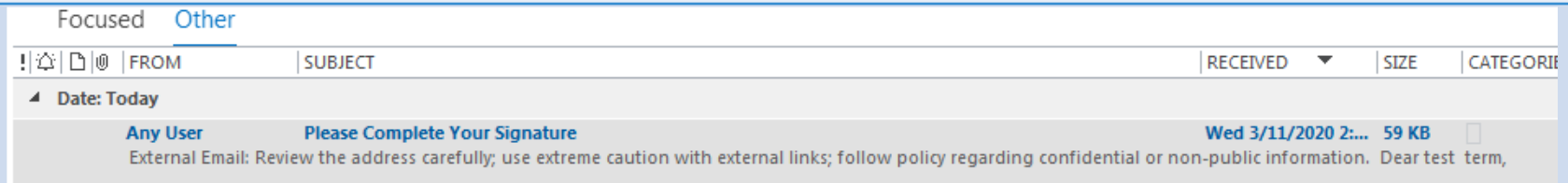


Getting Started

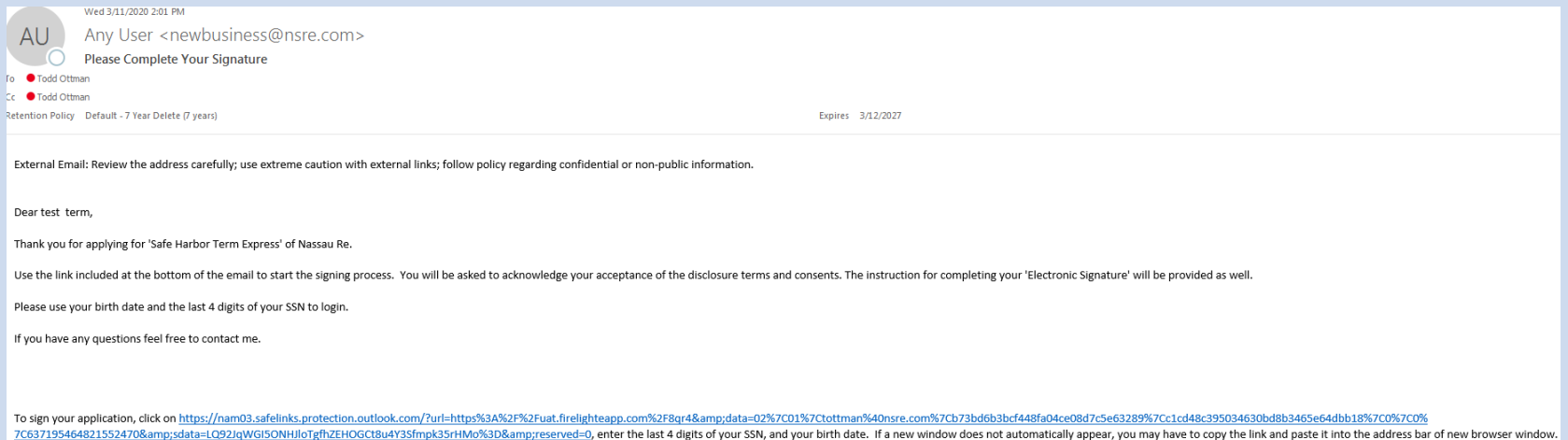
After you have completed your eSignature and sent an email request to your client, your client may have some questions on how to complete the signature process. This guide walks you through the client experience of eSigning so you can provide a positive experience for your client and you can complete your e-Application.

Your Clients' Email

1. After you submit an email request from eApp, the client will need to log on to the email account that they provided. The email title will be 'Please complete your signature.'



2. The email will instruct your client to click on the link at the bottom and log in using the last 4 digits of their SSN and DOB.



Client Login

3. When the client clicks on the link in the email, their internet browser window will open with a log-in portal. Your client should use the last 4 of SSN and DOB that you provided during the email request.

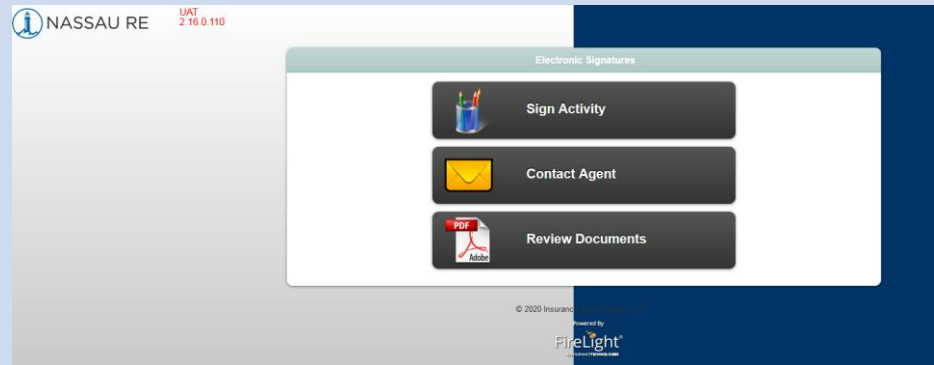
A central white login form is displayed against a dark blue background. The form has a light green header bar with the word "Welcome" in white. Below the header, there are two input fields: "Last 4 Digits of SSN/Government ID:" and "Birth Date (MM/DD/YYYY):". Each field is followed by a dark grey "Enter" button. A horizontal line separates this section from the next. Below the line, the word "OR" is centered in bold black text. Underneath, there is a "Passcode:" label followed by a single input field and another dark grey "Enter" button.

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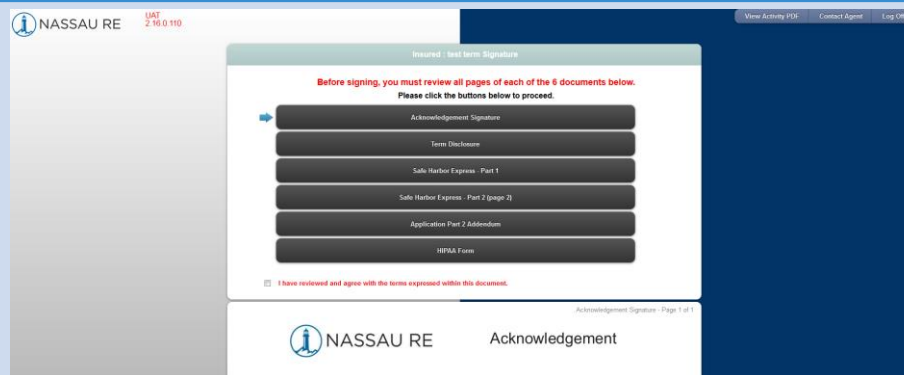
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Client Login, continued

4. After logging in, your client will be presented with options to view their application package, sign or contact agent.



5. After selecting Sign Application, your client will be brought to a screen where they will acknowledge each form that their signature will be applied to in the next step. Your client must agree to each form that will be e-signed. This is NOT the signature.





Reviewing and Signing

6. After consenting to each form, the client will be presented with the option to e-sign. Note the green checkmarks to the right of each form that has been consented to. Select Sign when complete.

Before signing, you must review all pages of each of the 5 documents below.
Please click the buttons below to proceed.

MYAnnuity 5X/7X Application	✓
Customer Identification Verification Form	✓
Fixed Annuity Suitability Questionnaire	✓
E-Signature Consent Form for Agent	✓
→ MYAnnuity Disclosure Document - no withdrawal	✓

7. Next, your client will be prompted to provide their name and city where signing. They will select I Consent when complete.

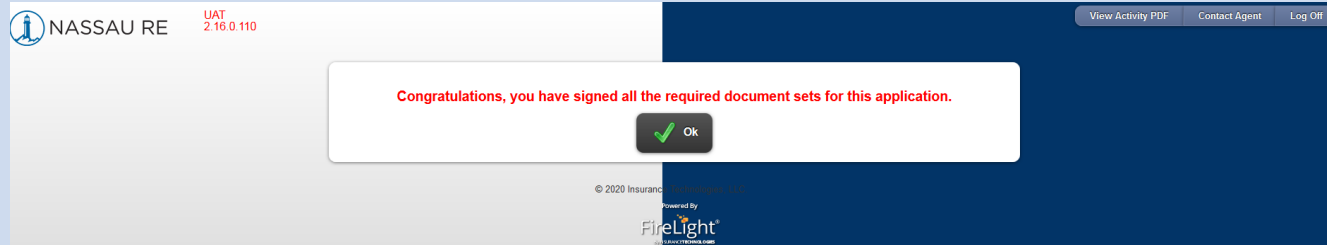
Agent Full Name: Agent ID:
City: State:
Today's Date:

Sign on this pad to override the text script

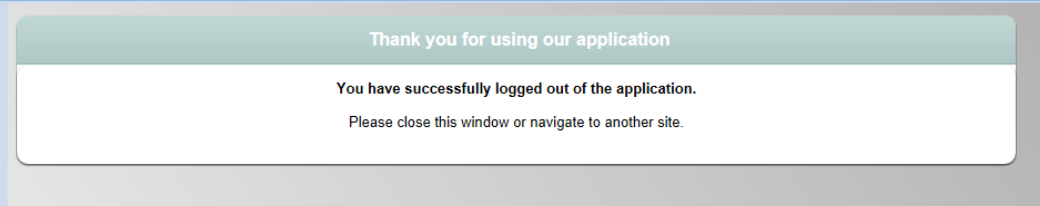
Any User

Wrapping Up

8. Your client will receive a confirmation that their signature has been completed. Note that the client still has the option to review all application forms or contact their agent in the top right.



9. After selecting OK, they will receive a confirmation that they have logged out.



10. You will receive an email notification informing you that the signature is complete. When all signatures have been completed, the application will be submitted to New Business.

Still have questions? Visit us at salesnet.nsre.com to download our complete eApp Submission Guide, or contact our Help Desk at 888-794-4447; Salesdesk option 1 or Annuity New Business option 3.