



Wealth Management  
Dominion Securities

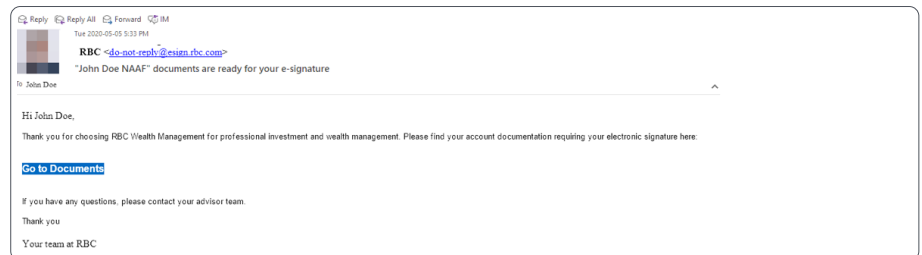


# Signing Documents Electronically with RBC Dominion Securities

eSign is a digital signature solution that enables you to sign account agreements electronically through our eSign application. This guide has been prepared to walk you through the steps.

## Receiving your Initiation Email and Signing into eSign

1. To begin the eSign process, an initiation email will be sent from RBC ([do-not-reply@esign.rbc.com](mailto:do-not-reply@esign.rbc.com)) to the email you provided notifying you of an eSign package requiring your signature. The email contains a link to the documents. To access the link, click the blue box labelled **GO TO DOCUMENTS**.

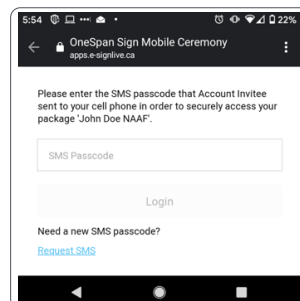


2. After clicking the link, you will be required to authenticate your identity via one of two methods.

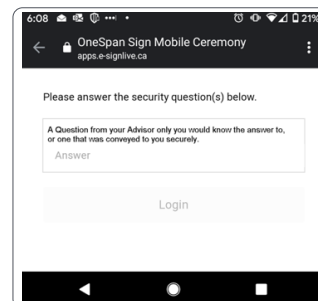
**Authentication by SMS (a)** requires you to enter a six-digit SMS code that you received on your mobile phone. Enter the code, and click **Login**. This SMS code is sent when you click the link in your invitation email.

**Authentication by Q&A (b)** requires you to answer one or more questions. Correctly answer all questions, and then click **Login**.

a.

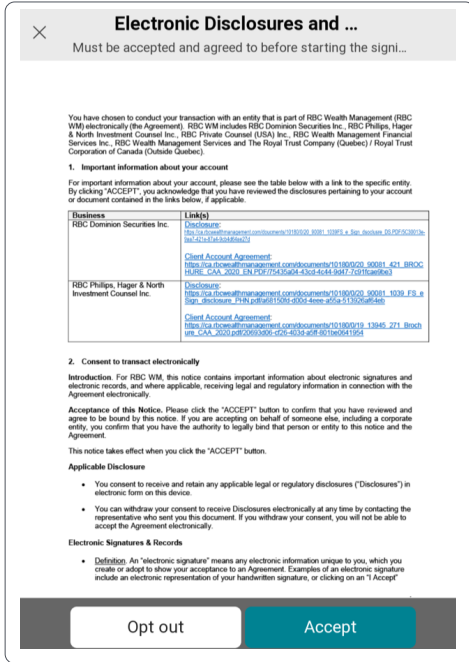


b.



## Electronically Signing your Documents

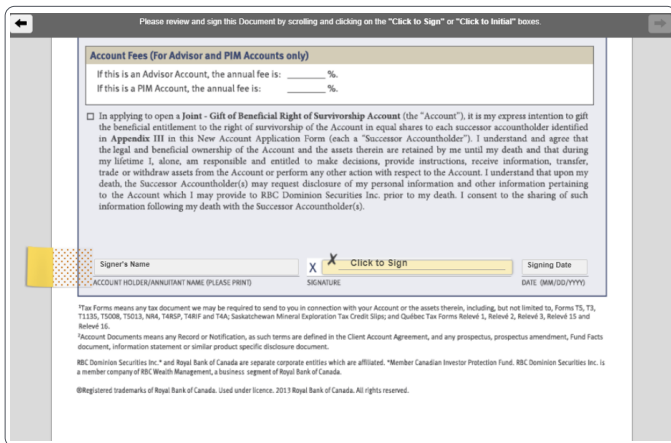
1. Read the *Electronic Disclosures and Signatures Consent* document. This disclosure must be accepted and agreed to before starting the signing process. If you agree, scroll to the bottom of the document and select **ACCEPT**.



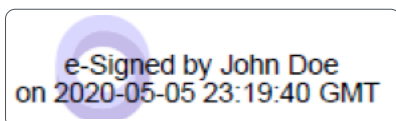
2. Once the Disclosure/Consent has been accepted, you will be directed to the account documents which require your electronic signature. Review the documents for completeness and accuracy and go to each signature tab and/or date prompt within the document to complete your signature/initials.

The menu on the left-hand side will show you the number of documents in the transaction that require your signature.

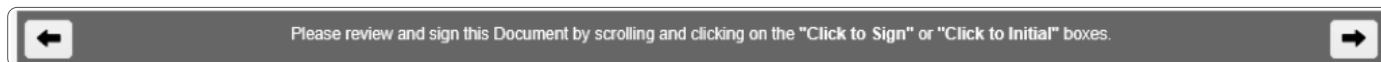
- If any unsigned Signature Boxes lie outside your viewing area, an **unsigned signatures** notification will show the number of signatures that are still required.
  - A Package Toolbar and Progress Bar at the top of the document indicates the number of signatures you have completed, as well as the total number of your signatures required.
3. Signature locations will be marked by the coloured tabs indicating where you are required to either initial or sign. Simply click on the tab to electronically sign or initial, the tab will turn green to show your signature/initial has been accepted. Text field boxes are outlined in red and will require actual input of information, this can be completed by typing in the field box.



- To e-sign the document, simply click on the signature box.



- If there are more than one document that requires your signature, click Next Document and continue to sign each document where indicated by yellow sticky notes until all documents are signed.



Side arrows located in document header bar allow you to navigate between documents should you need to.

- Once you are done signing the documents, click the Confirm button.

### Completing your Signing and Downloading the Completed Documents

- When all documents have been signed, the message bar at the top of the document will indicate that you have completed signing and the progress bar will indicate the number of signatures you have applied.
- You are also able to immediately download the signed documents for your records by clicking **DOWNLOAD THIS DOCUMENT** in the top menu bar. However, that button will be present only if the Package Owner and all other signers have already signed the document.
- If you do not want to download now, you can download the documents later. In the email message you receive, click the link to the document package. To download all documents, in the Global Navigation Toolbar click **DOWNLOAD ALL FILES**. To download specific documents, in the Package Toolbar & Progress Bar, click **DOWNLOAD** for each document you want to download. Follow the prompts to open or save the document.

### Opting Out of Signing

After a signer has been authenticated, they can opt out of signing. To opt out of signing at any time, click OPT OUT from the Actions Toolbar.

### Declining to Sign

After a signer has been authenticated, they can decline to sign. To decline to sign, click DECLINE from the Actions Toolbar.

### Assistance

If at any time during the process you have question or need assistance, please feel free to reach out to your advisor team.

### Minimum Requirements

#### Operating Systems

- Microsoft Windows 7, 8, 8.1, 10 (except touch-screen devices)
- Mac OS X

#### Browsers

- Internet Explorer 11
- Edge
- Chrome
- Firefox
- Safari

*For all browsers, cookies must be enabled.*

#### Mobile Devices

- iOS
- Android
- Windows



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