

Fidelity WealthCentral[®] Tagging Documents for eSignature

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Introduction

You have the ability to enable your own documents for eSignature via the Account Opening Tool. You assign eSignature tags based on eSignature [recipient roles](#).

You must have the **WC AOTOA Advisor Doc and ESIG** entitlement in order to upload your own, proprietary, eSignature-enabled documents to the Account Opening/Transfer of Assets Tool. This entitlement controls the display of the **Advisor Document Management** bricklet and you are prompted to specify if you intend to include your own proprietary documents.

Signer Tag Overview

When tags are used within a PDF form, you name the fields on your form using tag names.

Tags are defined for each expected signer. If you have 2 signers specified in the recipient list, you would typically add 2 text fields to your PDF and name them as follows:

ESIG_ADVISORDOC_SIGNER1_eSignFullName
ESIG_ADVISORDOC_SIGNER2_eSignFullName

The table below contains the eSignature tags that are available for your documents.



NOTE: At least one signer signature is required.

Signer Tag	Signer	Required/Optional
ESIG_ADVISORDOC_SIGNER1_	Account Holder 1	Required
ESIG_ADVISORDOC_SIGNER2_	Account Holder 2	Optional
ESIG_ADVISORDOC_SIGNER3_	Account Holder 3	Optional
ESIG_ADVISORDOC_SIGNER4_	Account Holder 4	Optional
ESIG_ADVISORDOC_SIGNER5_	Account Holder 5	Optional
ESIG_ADVISORDOC_SIGNER6_	Account Holder 6	Optional
ESIG_ADVISORDOC_SIGNER7_	Account Holder 7	Optional
ESIG_ADVISORDOC_ADVISOR1_	Advisor	Optional

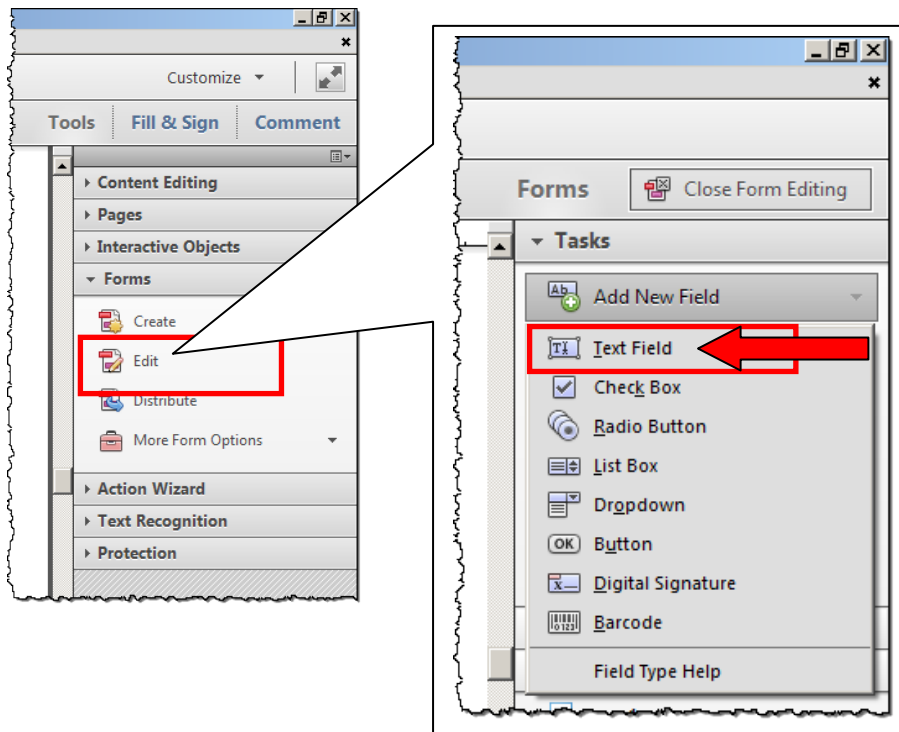
Placing Signature Tags with PDF Forms

Tagging involves creating a PDF and using **Adobe Acrobat or a similar PDF editor** to identify the places within your document where you want to specify the signature fields.

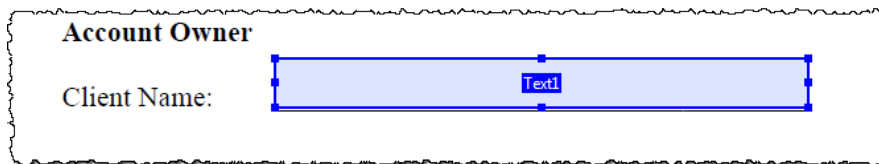


NOTE: We used Adobe Acrobat integration for Microsoft® Word® in the example below. Your process may differ slightly if you are using a different editor.

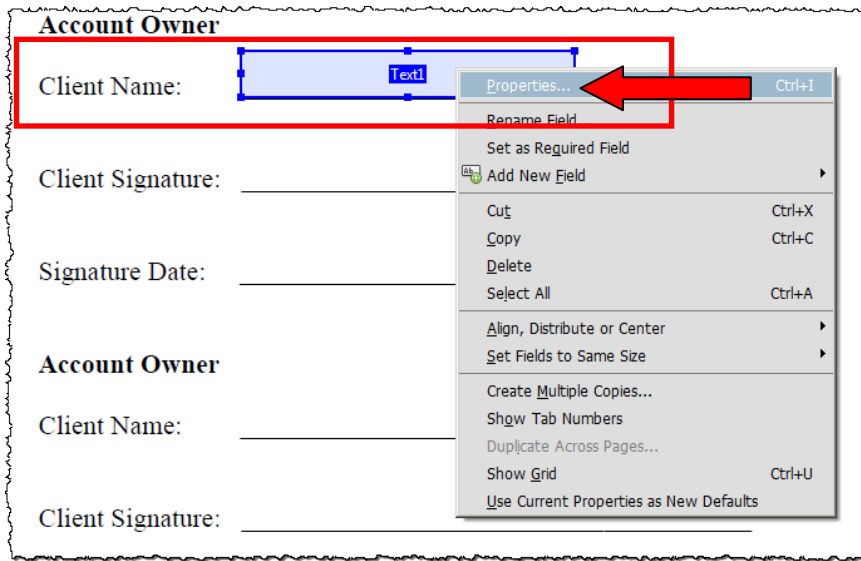
1. Create the PDF document.
2. Open the PDF in Adobe Acrobat.
3. Click **Tools > Forms > Edit > Add New Field**. Use the **Text Field** option for signatures, dates, and signer names.



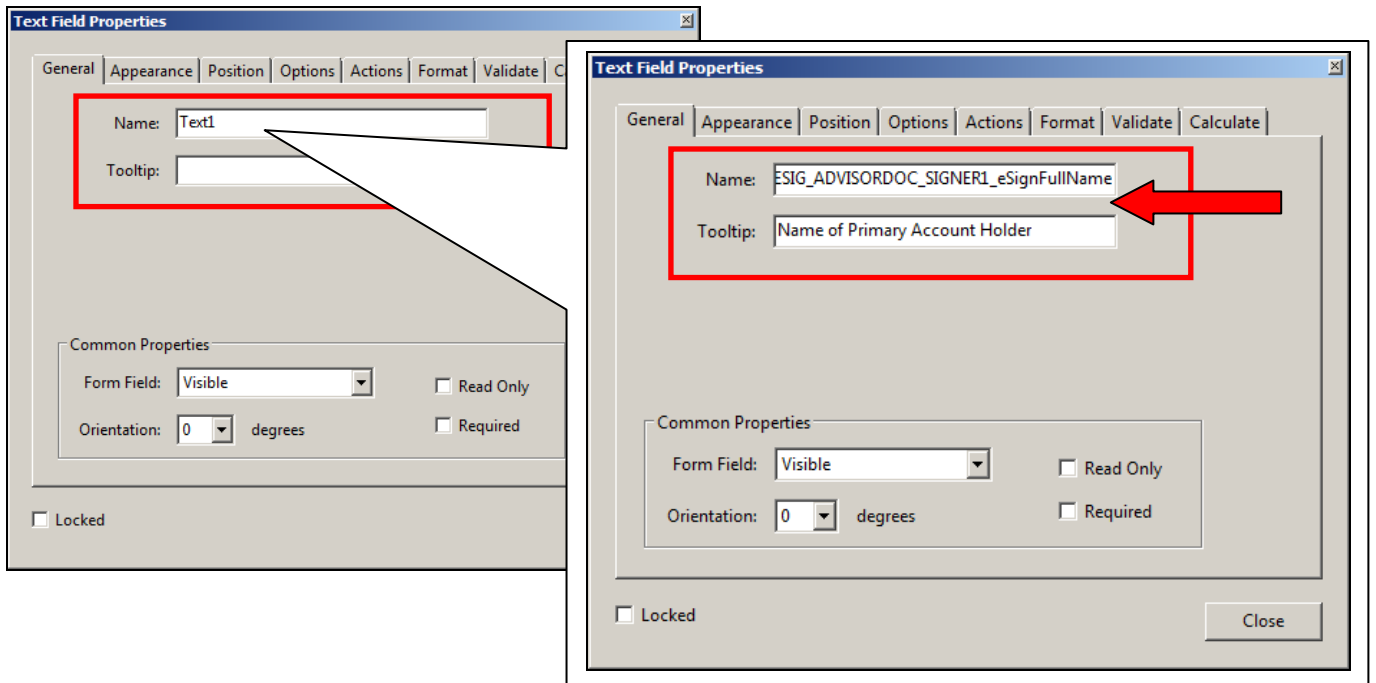
4. Highlight an area in the document that should be tagged based on the locations you identified.



- Right-click the PDF field and click **Properties**.



- Rename the field name using the [signer tag](#) to give an account holder action over the field.

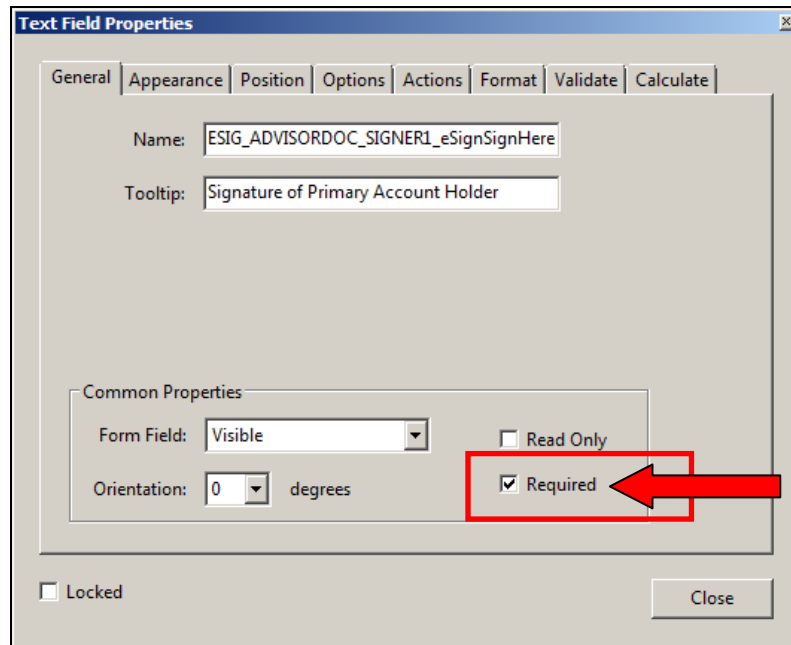


Tags

The following formatting should be used for the required **Name**, **Sign Here**, and **Date** fields:

Field Name	Signer	Signer Tag	Format
Name	Signer 1	ESIG_ADVISORDOC_SIGNER1_	ESIG_ADVISORDOC_SIGNER1_eSignFullName
Sign Here	Signer 1	ESIG_ADVISORDOC_SIGNER1_	ESIG_ADVISORDOC_SIGNER1_eSignSignHere
Date	Signer 1	ESIG_ADVISORDOC_SIGNER1_	ESIG_ADVISORDOC_SIGNER1_eSignDateSigned
Name	Advisor	ESIG_ADVISORDOC_ADVISOR1_	ESIG_ADVISORDOC_ADVISOR1_eSignFullName
Sign Here	Advisor	ESIG_ADVISORDOC_ADVISOR1_	ESIG_ADVISORDOC_ADVISOR1_eSignSignHere
Date	Advisor	ESIG_ADVISORDOC_ADVISOR1_	ESIG_ADVISORDOC_ADVISOR1_eSignDateSigned

7. Check the **Required** box to make a field required.



8. Repeat Steps 4-7 until all required areas are tagged.

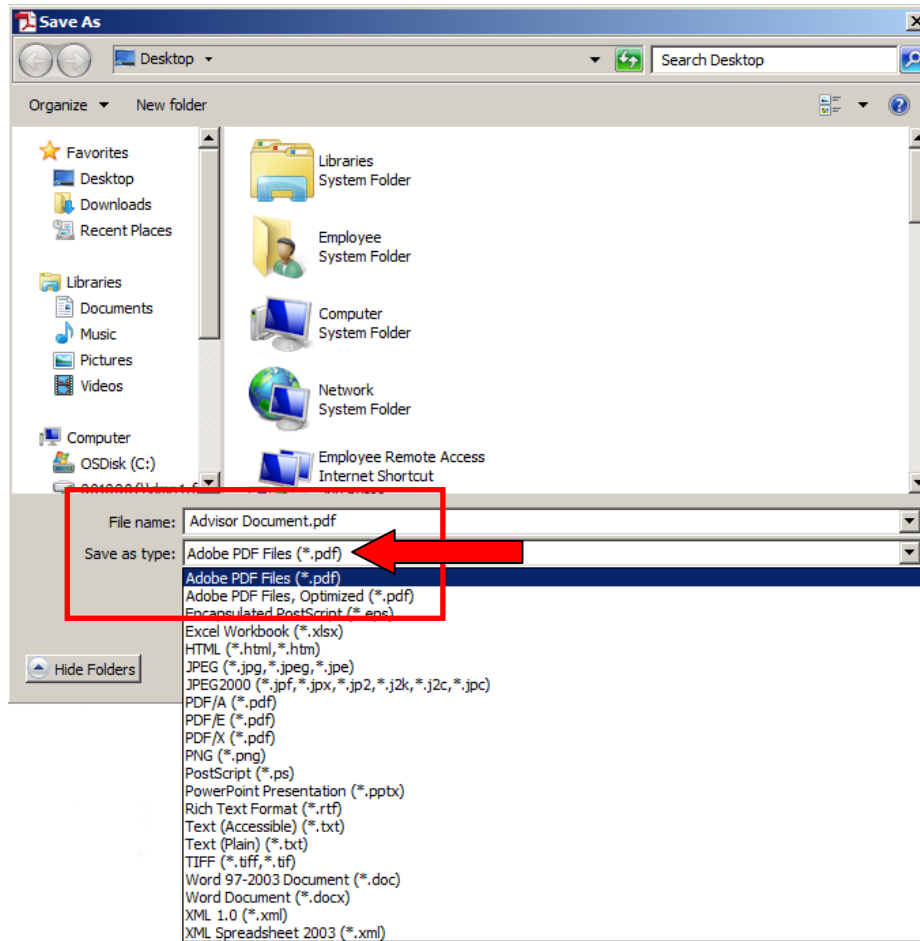
Account Owner

Client Name:

Client Signature:

Signature Date:

9. Save the tagged PDF in the **Adobe PDF Files** format so the fields are fillable.



10. Upload the tagged PDF to the Account Opening Tool and choose to include advisor documents in the **Advisor Document Management** bricklet.



NOTE: Signers only see the documents for which they are a signer within the eSignature envelope in DocuSign.

Signing Experience

The following sections describe the actions involved in the signing experience and signer roles associated with the eSignature ceremony.

Investor Signer Role

An investor signing a consolidated envelope:

- Receives a request from DocuSign to sign documents.
- Performs his authentication using Knowledge Based Authentication.
- In addition to signing Fidelity forms, signs the prepared advisor document(s).
- Confirms the signing when he completes all signatures.

Advisor Signer Role (if applicable)

An advisor signing his own documents:

- Receives a request from DocuSign to sign documents.
- Performs his authentication using the Access Code specified in the **Advisor Document Management** bricklet of the Account Opening Tool.
- Signs the advisor documents. **NOTE:** Only advisor documents are available for viewing and signing.
- Confirms the signing when he completes all signatures.

Document Recipient Role

The final document recipient:

- Receives a request from DocuSign to retrieve the final signed copy of his documents.
- Performs his authentication using the Access Code specified in the **Advisor Document Management** bricklet of the Account Opening Tool.
- After all signers have signed, retrieves the final signed copies of all documents from the envelope.

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