

WealthFusion

Grow Practice Dashboard

In this article you will learn:

- How to Create an Account
- Key Areas of the Grow Practice Dashboard

Creating an Account

Advisors can create a new account for a client by adding an opportunity for an existing contact or creating a new contact and opportunity.

The screenshot displays the 'New Business' section of the WealthFusion Grow Practice Dashboard. The interface includes a top navigation bar with 'Communicate', 'Manage Clients', 'Grow Practice', and 'Run Business'. Below this is a sub-navigation bar with 'Dashboard', 'Forms Library', and 'Customization'. A search bar is located in the top right corner. The main content area features a table with columns for 'Contact Information', 'Workflow', 'Investments', and 'Account Documents'. The table lists various accounts created for a client named Elaine, with columns for 'Last', 'First', 'Advisor Name', 'Type', 'Date Created', 'Last Edit', 'Status', 'Assets', and 'Account Type'. Each row includes a '+ Proposal' button and a 'Signatures' button. The 'Account Type' column lists various account types such as Conservatorship, Beneficiary IRA, SIMPLE IRA, Estate, Joint with Rights of Survivorship, IRA, Individual, Conservatorship, Personal Trust, Estate, Tenants in Common, Guardianship, and Custodian for a Minor.

Contact Information		Workflow	Investments	Account Documents	Action					
Last	First	Advisor Name	Type	Date Created	Last Edit	Status	Assets	Status	Account Type	
Jessamine	Elaine	AE Advisor 2	Account	08/15/2018	08/15/2018	+ Proposal	-	In Progress	Conservatorship	
Jessamine	Elaine	AE Advisor 2	Account	08/14/2018	08/14/2018	+ Proposal	-	Signatures	Beneficiary IRA	
Jessamine	Elaine	AE Advisor 2	Account	08/14/2018	08/14/2018	+ Proposal	-	Signatures	SIMPLE IRA	
Jessamine	Elaine	AE Advisor 2	Account	08/14/2018	08/14/2018	+ Proposal	-	Signatures	Estate	
Jessamine	Elaine	AE Advisor 2	Account	08/09/2018	08/09/2018	+ Proposal	-	Signatures	Joint with Rights of Survivorship	
Jessamine	Elaine	AE Advisor 2	Account	08/01/2018	08/02/2018	+ Proposal	-	Signatures	IRA	
Jessamine	Elaine	AE Advisor 2	Account	07/30/2018	08/02/2018	+ Proposal	-	Signatures	IRA	
Jessamine	Elaine	AE Advisor 2	Account	07/23/2018	07/26/2018	+ Proposal	-	Signatures	Individual	
Jessamine	Elaine	AE Advisor 2	Account	07/23/2018	08/02/2018	+ Proposal	-	Signatures	Conservatorship	
Jessamine	Elaine	AE Advisor 2	Account	07/23/2018	07/27/2018	+ Proposal	-	Signatures	Individual	
Jessamine	Elaine	AE Advisor 2	Account	07/20/2018	07/26/2018	+ Proposal	-	Signatures	Personal Trust	
Jessamine	Elaine	AE Advisor 2	Account	07/19/2018	07/19/2018	+ Proposal	-	In Progress	Estate	
Jessamine	Elaine	AE Advisor 2	Account	07/19/2018	07/20/2018	+ Proposal	-	In Progress	Tenants in Common	
Jessamine	Elaine	AE Advisor 2	Account	07/19/2018	07/19/2018	+ Proposal	-	In Progress	Guardianship	
Jessamine	Elaine	AE Advisor 2	Account	07/19/2018	07/19/2018	+ Proposal	-	Signatures	Custodian for a Minor	

Click the "New Contact" icon on the top right corner of the Grow Practice Dashboard to create a new contact and Opportunity. Clicking "New Contact" will open the Contact Information lightbox. Fill in the required Personal Information for the New Contact and click "Save" to create the Opportunity.

Contact Information ✕

Personal Information

Salutation ...	First Name * <input type="text"/>	Middle Name <input type="text"/>	Last Name * <input type="text"/>	MM	DD	YYYY	Advisor Code * ...	Office Code N/A
Email Address <input type="text"/>	Phone Number XXX XXX XXXX ext <input type="text"/>	Facebook <input type="text"/>	Twitter <input type="text"/>	Work Email Address <input type="text"/>	Work Phone Number XXX XXX XXXX ext <input type="text"/>	LinkedIn <input type="text"/>	Google+ <input type="text"/>	

Address

Home Address <input type="text"/>	Company Name <input type="text"/>
Zip <input type="text"/>	Company Address <input type="text"/>
City <input type="text"/>	Zip <input type="text"/>
State ...	City <input type="text"/>
	State ...

Alternatively, a user can create a new Opportunity for an existing contact by clicking “Existing Contact” at the top right-hand corner of the page. This will open the Opportunity Contact lightbox, where an Advisor can search for an existing contact by name. Click on the green arrow to the left of the contact to select it and move it to the right side. Name the Opportunity at the top of the screen and click “Save” to save the new Opportunity.

New Account

An Advisor can begin opening a new account by clicking “+Account” from the Grow Practice Dashboard.

Contact Information			Workflow		Investments		Account Documents		Action
Last	First	Advisor Name	Type	Date Created	Last Edit	Status	Assets	Status	Account Type
Jessamine	Elaine	AE Advisor 2		09/16/2018		+ Proposal	-	+ Account	
Jessamine	Elaine	AE Advisor 2	Account	06/11/2018	06/14/2018	+ Proposal	-	In Progress	Minor Traditional IRA
Jessamine	Elaine	AE Advisor 2	Account	06/13/2018	06/13/2018	+ Proposal	-	In Progress	Rollover IRA

All of the data entered on the screens will be mapped to the custodian forms.

Account Type

When the Advisor is creating a new account from the Grow Practice > Dashboard, they can select the Account Type on this screen.

AEWEALTH MANAGEMENT

Communicate Manage Clients **Grow Practice** Run Business

Dashboard Forms Library Customization

Open an Account

Account Type Account Owner Info Confirm

Open an Account

What type of account would you like to open? Account Number

Frequently Used

- Individual**
A standard, taxable account with one account holder.
- Joint with Rights of Survivorship**
A taxable joint account with right of survivorship
- IRA**
A tax-deferred retirement account. Contributions may be tax deductible.
- ROTH IRA**
A tax-free retirement account. Contributions are not tax deductible.
- Personal Trust**
- LPOA Account Transfer**

Non-Retirement Accounts:

- Community Property
- Community Property with Rights of Survivorship
- Estate
- Tenants by the Entireties
- Tenants in Common

Retirement:

- Rollover IRA
- SEP IRA
- SIMPLE IRA
- Beneficiary IRA
- Beneficiary ROTH IRA

UTMA/UGMA:

- Conservatorship
- Custodian for a Minor
- Guardianship
- Minor Traditional IRA
- Minor ROTH IRA
- Coverdell ESA

Account Owner Info

All required information about the Primary Account Owner should be entered on this page.


Primary Account Owner


Beneficiary

Basic Information

First Name*	Last Name*
<input type="text" value="Elaine"/>	<input type="text" value="Jjessamine"/>
Email Address	Phone*
<input type="text" value="123@gmail.com"/>	<input type="text" value="555"/> <input type="text" value="555"/> <input type="text" value="5555"/>

Address

Home Street Address * [+ Add Line](#)

Zip*

City* State*

I have a different mailing address.

Personal

I am a:

Social Security #*

Account Owner Info (Beneficiary)

After clicking “Continue”, the Advisor will be brought to the Beneficiary page. If the client has a beneficiary to add to his or her account, select the “Yes” radio button under the question “Does this account have beneficiaries?”. New information fields will appear for Advisors to fill in. Advisors can add additional primary or contingent beneficiaries by clicking on the “+Add another beneficiary” bar.

Primary Account Owner

Beneficiary

Does this account have beneficiaries?
 Yes No

Beneficiary #1 ✕ Remove

Individual Trust

First Name* 🗑️ Middle Name

Last Name*

Social Security # Type of Beneficiary:*
 Primary Contingent

Share:* % Per Stirpes

Date of Birth * 📅

+ Add another beneficiary

Back **Continue**

Click “Continue” to move to the next step of the new account process.

Statements & Confirms:

Statement and Trade Confirmation values are checked for electronic delivery. If these options are unchecked during the new account opening process, the custodian will mail paper statements and trade confirmations.


Cash & Dividends


Statements & Confirms

Electronic Delivery

Statements Trade Confirmations

Do not provide account owner(s) name for additional Corporate Communications.

Duplicate Statements & Confirmations

Statements Trade Confirmations

Back Continue

Funding

Account Transfer:

Users are able to answer Yes to the “Are you transferring in securities?” question and fill in the information to submit an account transfer from another brokerage firm, mutual fund company or insurance company. After answering “Yes,” check off the type(s) of asset(s) the client(s) will be transferring into the account. Each selected security type will reveal additional sections to fill in. Information on this screen will map to the Account Transfer form in the new account documents.

Account Transfer

Transfer Assets into Your Account

Are you transferring in securities?

Yes No

[Back](#) [Continue](#)

Account Transfer

Transfer Assets into Your Account

Account Transfer #1

What type of firm do you want to transfer from?

Brokerage Firm (Bank, Credit Union, or Trust Company)

Mutual Fund Company

Insurance Company

[Back](#) [Continue](#)

Account Transfer

Transfer Assets into Your Account

Account Transfer #1

Brokerage Firm Information

Delivering Firm*

Select

Delivering Firm Address (No PO Box)

Address Line 1

Address Line 2

Does the account title at the delivering firm differ from the account title at the receiving firm?

Yes No

Asset details

Full Transfer Partial Transfer

[Back](#) [Continue](#)

Advisors are able to submit multiple transfers for one account by clicking on the "+Transfer in from Another Account" bar. Information from this section will map to an additional Account Transfer form in the new account documents.

Confirm

The final step in the process of creating an account is to generate a PDF of the documents or send the application off for electronic signatures. On the Confirm screen, an Advisor can take a final review of all of the client's information and edit any information by clicking "Edit" at the right.

Account Type

Individual

Account Owner Info

Primary Account Owner's Name

 [Edit](#)

First Name	Last Name	Date of Birth
Elaine	Jessamine	06/06/1950

Individual Type

Social Security #

444-**-****

Primary Phone #

(555) 555-5555

Email Address

123@gmail.com

Once all information looks correct, the Advisor can have the client sign the documents either manually by printing the documents or electronically by clicking "Sign now" or "Email."

The electronic signature process can be initiated in one of two ways:

- Clicking "Sign now" launches the embedded signature process; the Advisor will sign the documents first, followed by the Client.
- Clicking "Email" will send an email to the Advisor with a link to the electronic signature process in DocuSign. Once the Advisor signs the documents, an email will be sent to the Client.



The screenshot shows a progress bar at the top with five steps: Account Type, Account Owner Info, Attributes, Funding, and Confirm. The Confirm step is highlighted in green. Below the progress bar are two main sections:

- Print Documents:** Contains the text "View or print a copy of the proposal and Investment Policy Statement before formally submitting the documents." and a green "Print" button.
- Sign Electronically:** Contains the text "Submitting the proposal and Investment Policy statement for e-signature will initiate the signature and online review process. Clicking on Sign Now allows you to sign the documents electronically within AdvisorEngine. Clicking on Email will send emails to all parties for their signature. Once the signing process has begun you will no longer be able to edit the information unless you recall the documents." and two green buttons: "Sign now" and "Email".

Electronic Signature Process

When the advisor clicks on an electronic signature option, the DocuSign Signing Process screen will pop up. If the client is transferring securities from another institution, the advisor will be required to upload a copy of their most recent account statement on the client's behalf. The advisor will be prompted with an upload icon during the DocuSign signature process.

DocuSign Signing Process

Please review the documents below.

FINISH OTHER ACTIONS

Account Co-Owner's Signature (if necessary): _____ Date: _____

Account Co-Owner's Printed Name (if necessary): _____

Account Co-Owner's Signature (if necessary): _____ Date: _____

Plan Administrator Signature (optional): _____ Date: _____

6 LETTER OF ACCEPTANCE FOR RETIREMENT PLANS (TD AMERITRADE COMPLETES)

To the prior trustee or custodian: Please be advised that TD Ameritrade Clearing, Inc. will accept the above-captioned account as successor custodian.

Successor Custodian Authorized Signature: _____ Date: _____

Please attach a copy of your account statement.

Once the advisor completes the DocuSign signature process, the client will be prompted to sign through the LexisNexis verification process. First, the client will enter their personal information, including the last four digits of his/her Social Security Number and Date of Birth. Next, the client will receive three identification questions. Correctly answering all three questions will allow the client to access the documents. If the client answers one question incorrectly, he/she will be given an additional question to answer. If the additional question is answered correctly, the client can access the documents; otherwise, the signature process will fail. *Please note if a client fails, they will need to wait 24hrs to attempt the DocuSign process again. The Advisor can contact AEW to request the envelope to be resent. This will relaunch the LexisNexis verification process before the 24 hour lockout period*

DocuSign Signing Process

DocuSign

Security Requests from Sender

AE Forms Administration
Fairwealth Solutions, LLC

ID Check - Personal Information

Enter your home address. This information, along with your name will be used to generate a list of questions to verify your identity.

Required Information (Home Address)

Name: Elaine Jjessamine

Street 1: 1293 Birdnest

Street 2: _____

City: Alhambra

State: CA

Zip: 91803

Last 4 digits of SSN: _____

Date of Birth: 06 / 06 / 1950
mm / dd / yyyy

You must enter required and valid information before you can continue.

NEXT CANCEL



ID Check - Identification Questions

These questions are being generated as a means of an identity check requested by the document sender. None of this information is provided to the document sender or to anyone except you.

Which of the following people have you known?

- Armand Pitre
- Lorraine Jobin
- Gaston Robichaux
- Marcel Chaffee
- Genevieve Beauvais
- I do not know ANY of the people listed

Which of the following corporations have you ever been associated with?

- Advocates Realty Inc
- Tractoamerica Inc
- Davis Islands Chamber Of Commerce Inc
- Zenith Prod
- Factoids
- None of the above

Which of the following domain names have ever been registered in your name?

- Diannesofscottsdale.com
- Recovery-resources.net
- Exhibithelp.com
- Soapoperacentral.com
- Noboss.com
- None of the above

Which of the following addresses have you ever been associated with?

- 1128 Sabine St
- 402 South Avenue L
- 14506 Cypress Green Drive
- 8103 Stillwood Lane
- 1801 Alma Drive
- I have never been associated with any of these addresses

In which of the following counties have you ever lived or owned property?

- Brazos, Texas
- San Joaquin, California
- Collin, Texas
- Travis, Texas
- Hidalgo, Texas
- I have never lived in any of these counties

Based on your background, in what city is '323 East Edison Street'?

- Benicia
- Rancho Cucamonga
- Chula Vista
- Temecula
- Fairfield
- I have never been associated with this address

There are typically 3 reasons why clients might not be recognized via the LexisNexis verification process:

1. They have entered an incorrect address, SSN, or DOB information. Please confirm their information with them before they try signing again.
2. They have moved recently and LexisNexis is not able to locate them using their current address.
3. The client is young, perhaps between the ages of 18-20, and there's not enough public data to pull to verify them. They might not have a lease in their name or any bills in their name.

Dashboard

On the Grow Practice Dashboard, Advisors can open new accounts.

Contact Information			Workflow	Investments			Assets	Account Documents		Action
Last	First	Advisor Name	Type	Date Created	Last Edit	Status		Status	Account Type	
<input type="checkbox"/>	Jessamine	Elaine	Account	08/15/2018	08/15/2018	+ Proposal	-	In Progress	Conservatorship	
<input type="checkbox"/>	Jessamine	Elaine	Account	08/14/2018	08/14/2018	+ Proposal	-	Signatures	Beneficiary IRA	
<input type="checkbox"/>	Jessamine	Elaine	Account	08/14/2018	08/14/2018	+ Proposal	-	Signatures	SIMPLE IRA	
<input type="checkbox"/>	Jessamine	Elaine	Account	08/14/2018	08/14/2018	+ Proposal	-	Signatures	Estate	
<input type="checkbox"/>	Jessamine	Elaine	Account	08/09/2018	08/09/2018	+ Proposal	-	Signatures	Joint with Rights of Survivorship	
<input type="checkbox"/>	Jessamine	Elaine	Account	08/01/2018	08/02/2018	+ Proposal	-	Signatures	IRA	
<input checked="" type="checkbox"/>	Jessamine	Elaine	Account	07/30/2018	08/02/2018	+ Proposal	-	Signatures	IRA	
<input type="checkbox"/>	Jessamine	Elaine	Account	07/23/2018	07/26/2018	+ Proposal	-	Signatures	Individual	
<input type="checkbox"/>	Jessamine	Elaine	Account	07/23/2018	08/02/2018	+ Proposal	-	Signatures	Conservatorship	
<input type="checkbox"/>	Jessamine	Elaine	Account	07/23/2018	07/27/2018	+ Proposal	-	Signatures	Individual	
<input type="checkbox"/>	Jessamine	Elaine	Account	07/20/2018	07/26/2018	+ Proposal	-	Signatures	Personal Trust	
<input type="checkbox"/>	Jessamine	Elaine	Account	07/19/2018	07/19/2018	+ Proposal	-	In Progress	Estate	
<input type="checkbox"/>	Jessamine	Elaine	Account	07/19/2018	07/20/2018	+ Proposal	-	In Progress	Tenants in Common	
<input type="checkbox"/>	Jessamine	Elaine	Account	07/19/2018	07/19/2018	+ Proposal	-	In Progress	Guardianship	
<input type="checkbox"/>	Jessamine	Elaine	Account	07/19/2018	07/19/2018	+ Proposal	-	Signatures	Custodian for a Minor	

To view completed documents in PDF format, click on the PDF icon next to the statuses. To delete an opportunity, check the corresponding box on the left-hand side and select Delete from the “Select action” dropdown menu on the bottom of the page. To delete all existing opportunities, click the box in the header row to select all line items on the screen, and select Delete from the “Select action” dropdown menu.

On the Dashboard, Advisors are able to see the status of accounts they have created through AdvisorEngine and have the ability to sort by account status by selecting one of the following statuses from the dropdown in the upper left-hand corner:

- All
- New
- In Progress
- Available
- Approved
- Opened
- Expired/Rejected

Statuses

Workflow		Investments		Account Documents	
First	Advisor Name	Type	Date Created	Last Edit	Status
Elaine	AE Advisor 2	Account	08/16/2018	08/16/2018	+ Proposal
Elaine	Brandon Olson	Account	08/15/2018	08/15/2018	+ Proposal
Elaine	AE Advisor 2	Account	08/14/2018	08/14/2018	+ Proposal
Elaine	Brandon Olson	Account	08/14/2018	08/14/2018	+ Proposal
Elaine	AE Advisor 2	Account	08/14/2018	08/14/2018	+ Proposal
Jessamine	Elaine	Account	08/09/2018	08/09/2018	+ Proposal
Jessamine	Elaine	Account	07/30/2018	08/02/2018	+ Proposal

Here are all possible account statuses and brief explanations of each:

	<p>After a prospect is created, the +Account box appears. By clicking on the status, Advisors can launch the new account process.</p>
	<p>The In Progress box indicates that an Advisor has begun the account process, but has not yet completed it and sent it out for signatures. The Account can still be edited in this stage.</p>
	<p>The Account is out for signatures from the client and Advisor via the electronic signature process in DocuSign.</p>
	<p>The account is ready for AEWM review and approval.</p>
	<p>The status will change to 'In Review' when the confirmation of signatures from DocuSign has been received for client(s) and advisor(s) and AEWM has pulled the documents to begin the review process.</p>

<p>Approved</p>	<p>The account has been approved and sent to the custodian.</p>
<p>Opened</p>	<p>The account has been opened by the custodian.</p>

Advisors may take actions on their opportunities by clicking on the arrow under the Action header on the right-hand side of the page.

Add New Business for: **Existing Contact** **New Contact**

Account Type ▾	Action
LPOA Account Transfer	▾
SIMPLE IRA	▾
Custodian for a Minor	▾
IRA	▾
IRA	▾
Individual	▾
Individual	▾
Individual	▾

Actions ▾

 [Edit Contact](#)  [Link Contact](#)

 [Duplicate](#)  [Delete](#)

 [Recall Documents](#)

 [Operational Status](#)

 [Summary view](#)

Edit Contact

Clicking on “Edit Contact” will open the Contact Information box for the opportunity. Here, Advisors can enter or edit a prospect’s Personal Information and Address. Click “Cancel” to cancel the edits and click “Save” to save the edits.

Contact Information ✕

Personal Information

Salutation	First Name *	Middle Name	Last Name *	Birthday			Advisor Code *	Office Code
...	Elaine	Individual	Jjessamine	06	01	1950	ADV2	N/A

Email Address	Phone Number			Facebook	Twitter
123@gmail.com	789	789	7899	ext	

Work Email Address	Work Phone Number			LinkedIn	Google+
	XXX	XXX	XXXX	ext	

Address

Home Address	Company Name		
1293 Birdnest			

Zip	Company Address		
91803	123 Way		

City	State	Zip
Alhambra	CA	

City	State
Topeka	KS

Duplicate

Duplicating an opportunity will create a new prospect with the Primary Account Owner Information.

Use this function to speed up the process of creating duplicate accounts for an individual. After successfully duplicating a prospect, an “Opportunity was copied successfully” message will pop up. The duplicated opportunity will appear at the top of the page.

Recall Documents

Clicking on “Recall Documents” will void the DocuSign envelope that was created and change the account status from “Signatures” back to “In Progress”. By recalling the envelope, the user will be allowed to make changes to the new account information before regenerating new documents via the “Print” button or launching the electronic signature process by clicking on “Sign Now” or “Email”. This option only appears for opportunities with the “Signatures” status.

Operational Status

Advisors can check the status of the electronic signature process by clicking on “Operational Status.” The progress bar contains the names and dates of the users who took action on the forms and the names and dates of the individuals who signed the document(s). The Operational Status will look similar to this for a completed application:

Operational Status



Elaine Individual Jjessamine (467394138)

Advisor Code ADV2

Proposal

+Proposal	In Progress	Signatures	In Review	Approved/Rejected

Account Documents

+Account Cathy Goodman 06/19/2018	In Progress Cathy Goodman 06/19/2018	Signatures Wet Ink 06/19/2018	In Review Cathy Goodman 06/19/2018	Approved Cathy Goodman 06/19/2018

Account Funding

Approved	Funded	Ready to Trade

Fee Assignment

+Default Schedule	In Review	Approved

Below each section of the bar is the title of the step, the name of the individual who performed the action, and the date the step was completed.

Legend

- | | | |
|----------|---------------------------------|---|
| 1 | + Proposal
+ Account | New proposal(s) or account(s) are created for a client or prospect. |
| 2 | In Progress | The documents are in the process of being filled out. |
| 3 | Signatures | The documents have been finalized and submitted for review. |
| 4 | In Review | The documents are being reviewed by firm personnel. |
| 5 | Approved | The documents have been approved by firm personnel. |
| 6 | Rejected | The documents have been rejected by firm personnel. |

The Legend displays the different statuses of the Account opening process.

Summary View

The Summary View shows a summary of data collected during the New Account process and is typically used to quickly review pertinent information.

Summary View

Elaine J Jessamine (467394137) Advisor Name AE Advisor 2 Advisor Code ADV2

Account Type Individual	Date of Birth/Age 06/01/1950 (68 years)	Income —	Employment Status Employed	Initial Investment —	Net Worth —	Liquid Net Worth —	Existing Accounts No
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Recommended Allocation



100% None

Selected Allocation



100% None

Account Records

Below you will find the account opening and investment policy statement information relating to your portfolio.

Documents	Date	View	Upload Document
Account Opening Documents	06/19/2018		<input type="text" value="Browse files..."/> <input type="button" value="Upload"/>
Signed Documents	Date	View	<i>Documents must be under 10MB. Files must be PDFs</i>
Account Opening Documents (Signed)	06/19/2018		

Notes

1. This section includes Account Owner Information from the Account process.
2. “Documents” displays the names of the documents generated by the workflow, the dates they were created, and a PDF icon that the Advisor can click on to view the document in PDF format. Supporting documents can also be uploaded here.
3. Notes that Advisors have entered during the proposal process for the client’s account will appear in the “Notes” section. New notes can also be added here.

**No Notification is sent to AEWM when a note or supporting documents are uploaded in this section. **

The DocuSign Certificate of Completion will be appended to the bottom of the forms PDF once the DocuSign process has been initiated. This document will be included in the client documentation packet sent to TDA.



Certificate Of Completion

Envelope Id: 4C8A2DB9501F4A5CBF5A982E4DFD3083	Status: Sent	
Subject: Documents from AE Wealth Management - AE Advisor 2 - Elaine Jjessamine - Minor Traditional IRA		
Source Envelope:		
Document Pages: 7	Signatures: 2	Envelope Originator:
Certificate Pages: 5	Initials: 0	DEMO
AutoNav: Enabled		demo
Envelopeld Stamping: Enabled		new york, NY 10017
Time Zone: (UTC-08:00) Pacific Time (US & Canada)		ac@4xxi.com
		IP Address: 52.45.151.145

Record Tracking

Status: Original	Holder: DEMO	Location: DocuSign
7/20/2018 10:52:08 AM	ac@4xxi.com	

Signer Events

AE Advisor 2
mpark@advisorengine.com
Security Level:
.None
ID: 758db7c6-516a-4e7e-87c8-71b11f42066f
7/20/2018 10:52:11 AM

Signature

DocuSigned by:

AAD6341267B7460...
Signature Adoption: Pre-selected Style
Using IP Address: 184.187.231.138

Timestamp

Sent: 7/20/2018 10:52:10 AM
Viewed: 7/20/2018 10:52:18 AM
Signed: 7/20/2018 10:52:22 AM

Electronic Record and Signature Disclosure:

Accepted: 3/28/2018 7:03:00 AM
ID: ee7e2924-c894-4446-bc7f-9a2ab0f02368

Elaine Jjessamine
123@gmail.com
Security Level:
.None
ID: 0b34fea3-992a-4e5e-9338-ac9fc135e3d7
7/20/2018 10:52:26 AM, Authentication

DocuSigned by:

85D8C0E0D337C41A...
Signature Adoption: Pre-selected Style
Using IP Address: 184.187.231.138

Sent: 7/20/2018 10:52:25 AM
Viewed: 7/20/2018 10:52:45 AM
Signed: 7/20/2018 10:52:50 AM

Authentication Details

ID Check:
Transaction: 23020931803577
Result: passed
Vendor ID: LexisNexis
Type: iAuth
Recipient Name Provided by: Recipient
Information Provided for ID Check: Address, SSN9, SSN4, DOB
Performed: 7/20/2018 10:52:40 AM

Electronic Record and Signature Disclosure:

Accepted: 6/12/2018 7:50:15 AM
ID: 25f789d0-6213-4dfa-82fa-d570136dbd0c