

DocuSign quick guide

We've updated our processes to make the completion and submission of new business for the International Bond (IB) as simple as possible. Please be aware this guide is in respect of the retail International Bond and not the Wrap International Portfolio Bond.

This quick guide takes you through the International Bond DocuSign process.

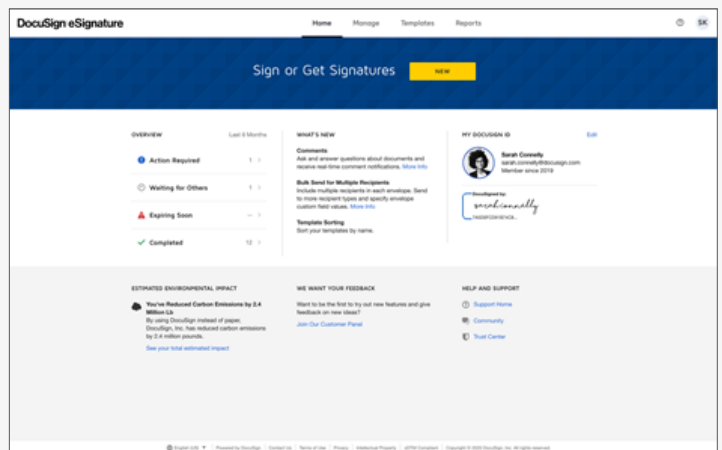


- 1 Provide your email address, full name and company name to `New_business_team@slinternational.ie`
- 2 Our team will set you up as a user and will send you an activation link along with a password
- 3 Click the link to activate your account

What is the process for completion of new business?

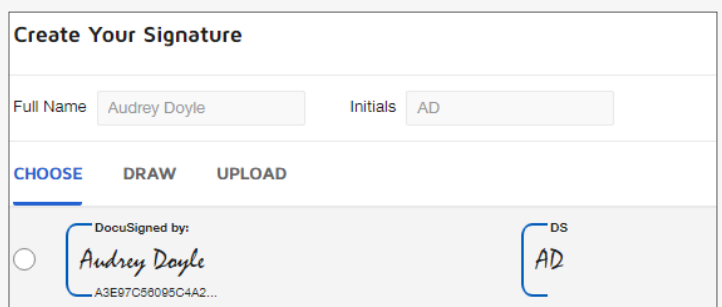
Step 1

Once you have registered your account you will see the home page.



Step 2

You will be asked to create/upload your signature.



What is the process for completion of new business? (continued)

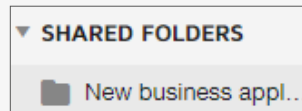
Step 3

Move to templates to choose the application you wish to submit.



Step 4

Click shared folders on side navigation to open a listing of the International Bond application forms.



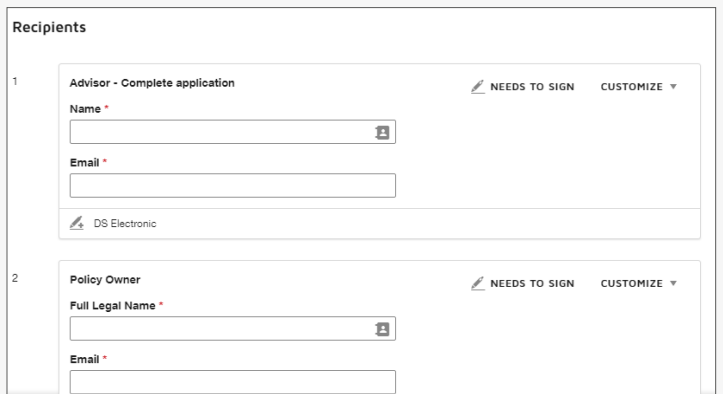
Step 5

Click on the “USE” Button.



Step 6

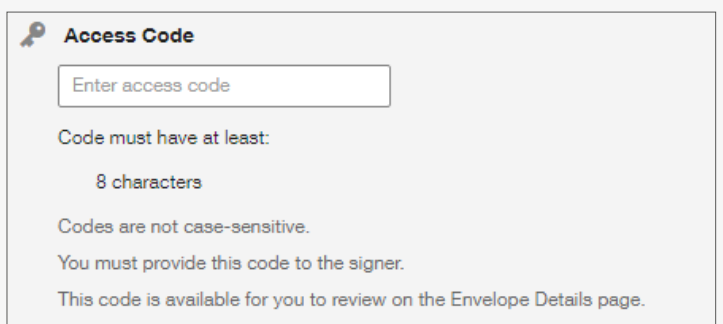
Apply signatories required. Delete any signatories not needed for the flow by clicking the “x” button.



Step 7

For each signatory you will need to add a secure code of your choice.

This must be sent to to the customer in a separate e-mail/other communication for security purposes before they can view the application form.



What is the process for completion of new business? (continued)

Step 8

You can include a personalised message to all recipients if required.

Message to All Recipients

Email Subject*

Characters remaining: 57

Email Message

Characters remaining: 10000

Step 9

Once you have all the email addresses noted click “send ” and “sign now”.

Do you want to sign this document now?

SIGN NOW
SIGN LATER

Step 10

Complete all the mandatory fields marked red as well as any other applicable fields for your application and click “finish”.

International Bond from Standard Life International

Part 1 – Financial adviser details (to be completed by your financial adviser)

Failure to complete the following will delay the processing of this application.

Agency code (MUST be completed)	/		FCA/PRA or other authorisation number	
Agency name				
Name of regulator				
Business writer name(s)				

Contact – Who should we contact with any questions about this application?

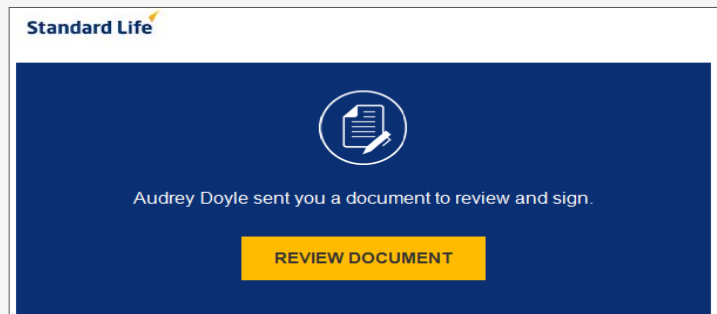
Step 11

The file will go by email immediately to the first recipient noted in the signatory flow.

What is the process for completion of new business? (continued)

Step 12

Each signatory will receive an email and must insert the secure code to view.



Step 13

When all required signatories have signed, the file will be returned to the adviser for final review, signature and any further attachments. Click "complete" to finish the process.

Step 14

The file will be sent directly to our new business mailbox and to our stream scanning system ready for processing. A copy will also be sent to you and the form will be stored in your DocuSign inbox marked completed.

Q&As

1. Which documents are available on DocuSign?

- International Bond application form (Individual)
- International Bond application form (Discretionary Investment Manager investment)
- Adviser Declaration for Enhanced Discretionary Option
- International Bond application form (Trust)
- International Bond application form (Trust - Discretionary Investment Manager investment)

2. Should I submit AML verification documents with the application?

No, we will carry out a Call Validate check to verify the customer's identity when we receive your application. If this passes then no AML documents are required. If it does not pass we will contact you for AML documents, which do not need to be certified.

3. What level of authentication is required to submit an application via DocuSign?

Standard authentication is required. When emailing the application form to the client, for maximum security please add a passcode via phone or a second encrypted mail. This detail is captured in the certificate of completion, providing a full audit trail.

4. How do I attach documents such as Court Deputy Orders or source of wealth evidence?

There is an option to attach Court Deputy Orders next to the relevant section of the form. Source of wealth evidence can also be attached at that section, as it's typically required for large premium cases.

5. Can I submit a trust deed via DocuSign?

Existing trust deeds

You can submit an existing trust deed via the attachment tab on the trust application form.

New Standard Life trust deeds

Although new Standard Life trust deeds cannot be completed on DocuSign (due to the requirement to witness signatures), the trust bond application form can be. The deed must pre-date the application form as it establishes the trustees and gives them authority to set up the bond.

6. What happens if a mistake is made on the application form?

If the application form is completed and sent to the customer who notices an error, they simply decline the form or contact the adviser. The adviser then corrects the document before resending to the customer. Once an envelope is "complete" meaning all recipient actions have been taken, there is no way to alter the content.

7. Who should I contact if I have further DocuSign queries?

T: 0345 300 4273

E: New_business_team@slinternational.ie

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