Client Process Guide

[Discretionary Investment Management Agreement]

As the client signing the agreement, this guide will show you how to use DocuSign when you are processing the Discretionary Investment Management Agreement. The process summary is included directly below:

- **Adviser / Admin**: Request Link from IP Investment Team
- **IP Invetsment Team**: Send link to Adviser/Admin
- **Adviser / Admin**: Fill in required details
- **Adviser / Admin**: Adviser/ Admin sends final agreement link to Client
- **Client**: Client Signs Investment Management Agreement
- **All**: Adviser/ Admin, Investment team, and Client are sent a copy of the signed agreement with completion certificates.

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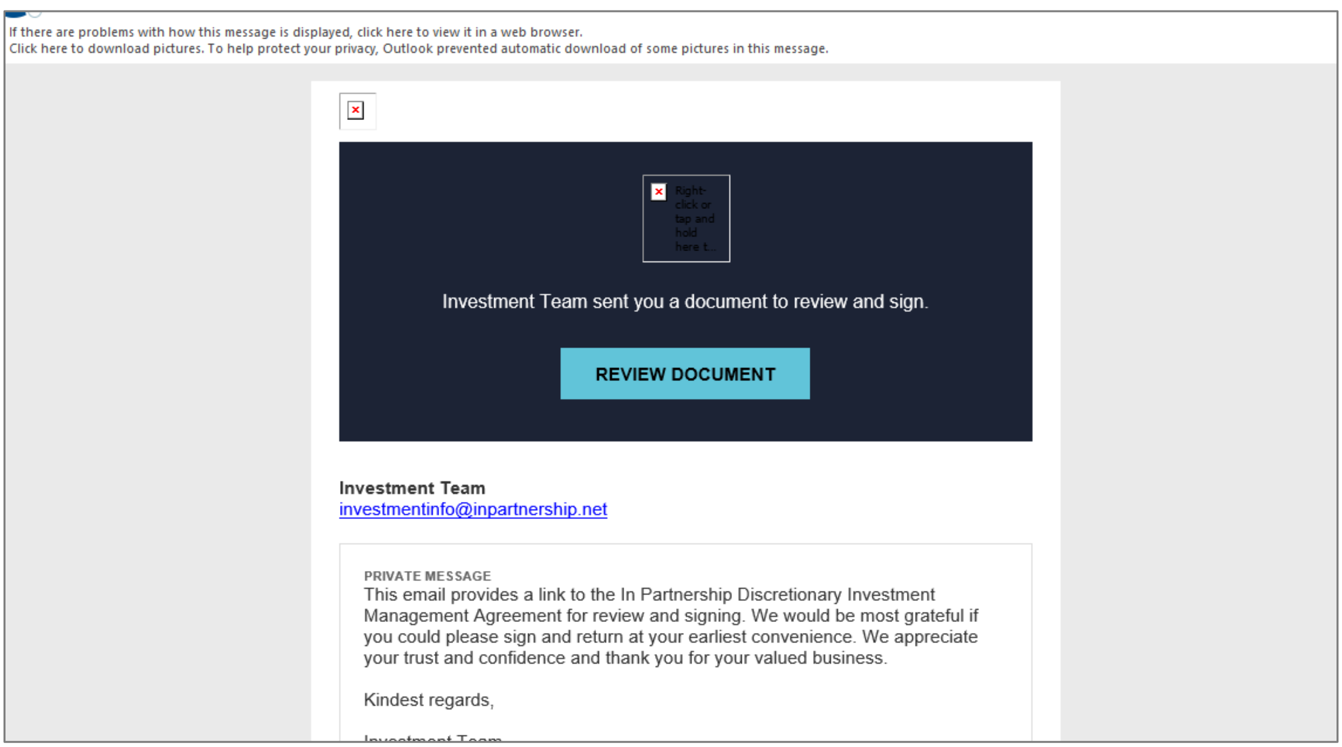
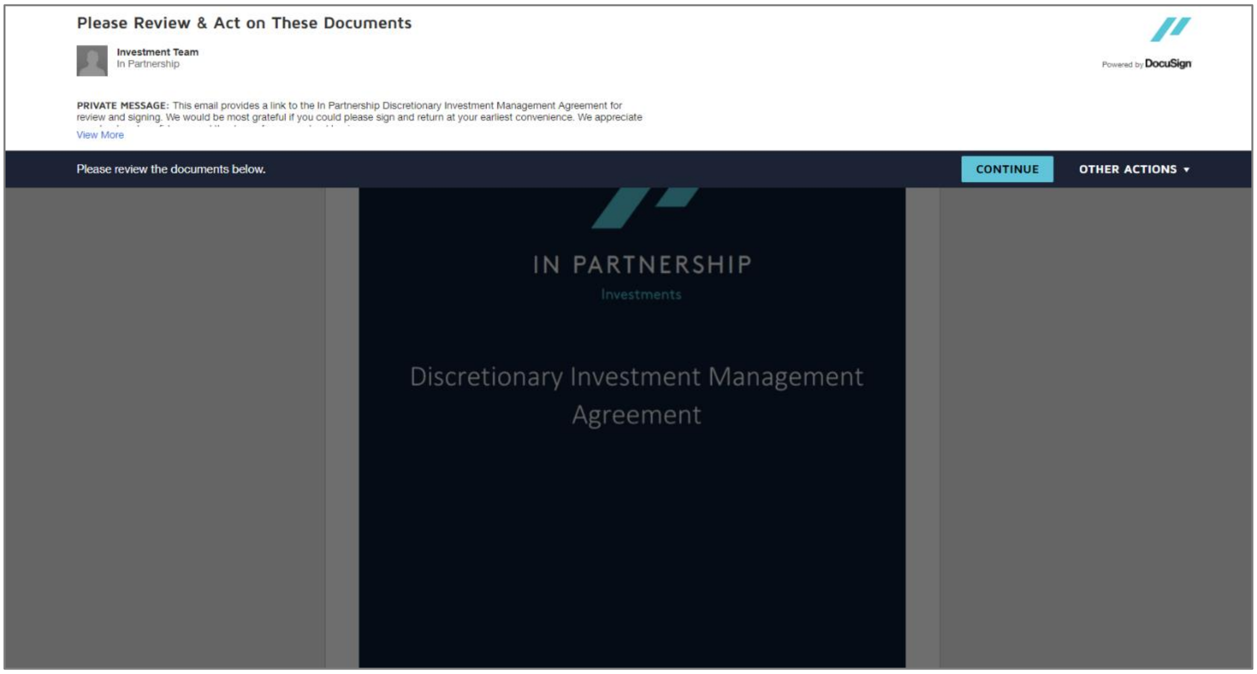
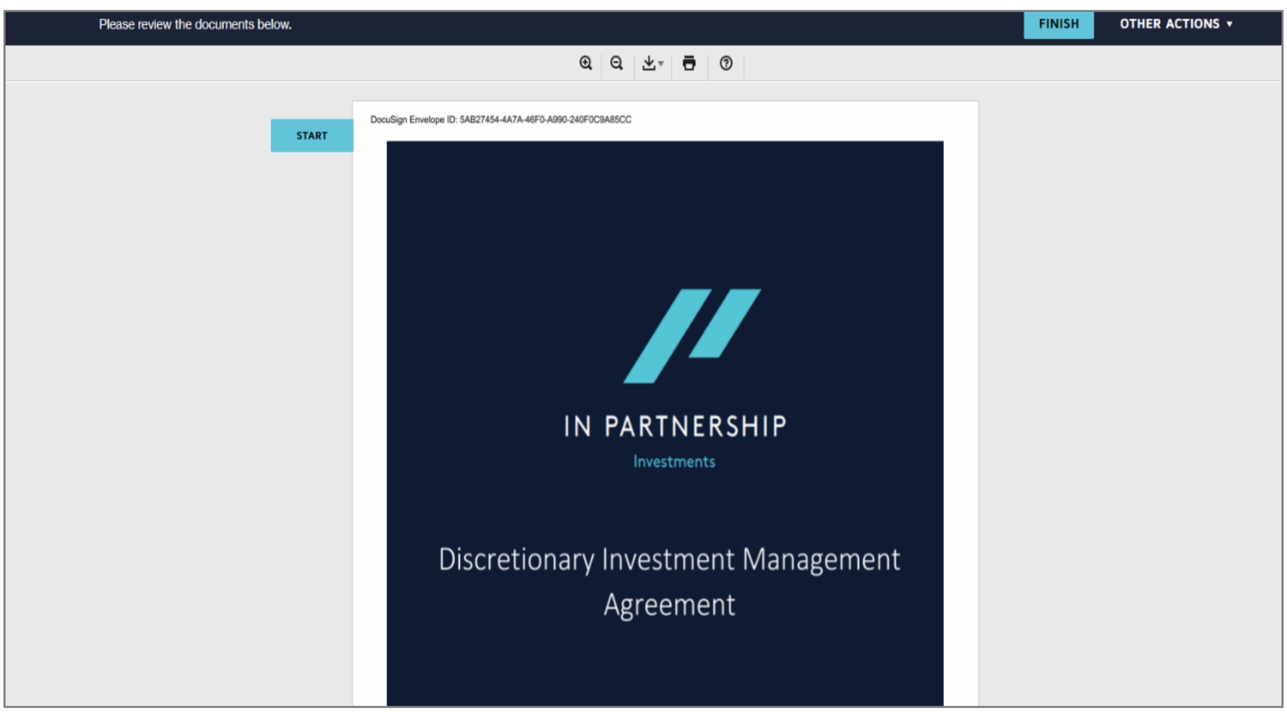
1. After confirming with your financial adviser that you have chosen to invest in the IP Model Portfolios, the adviser will send you a link to sign the Investment Management Agreement. As the client, you will receive a DocuSign link where you click <u>review document</u> to get redirected to the relevant document.



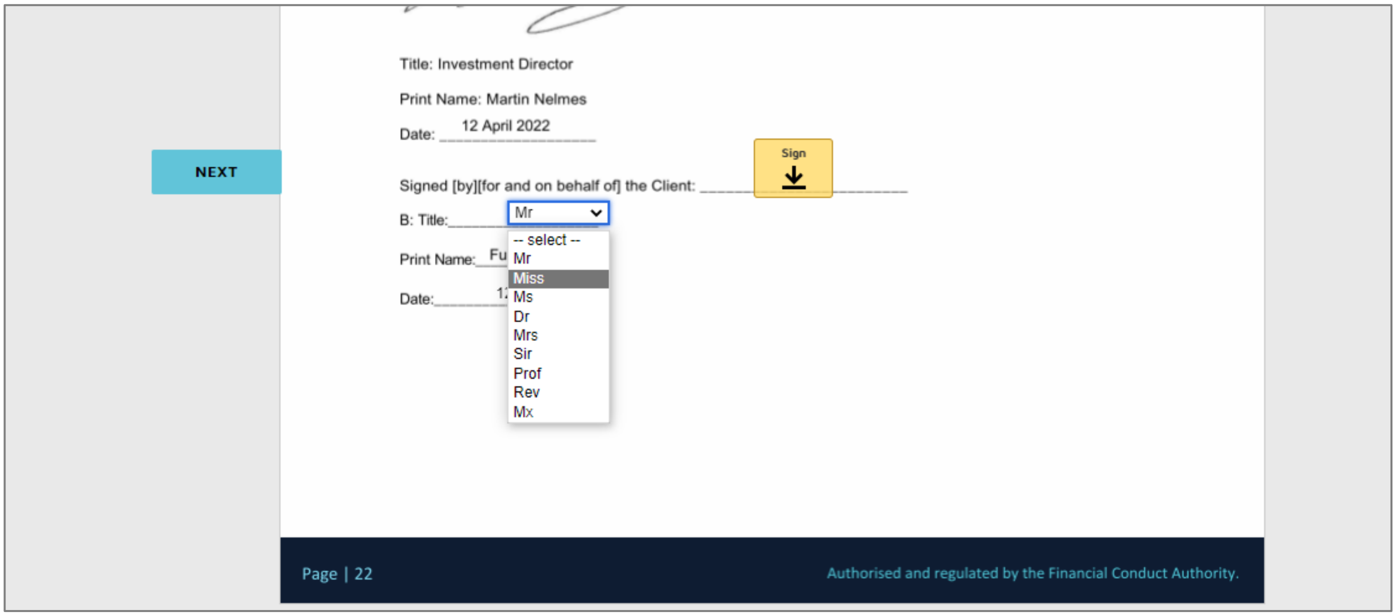
2. Please click continue to proceed to the document.



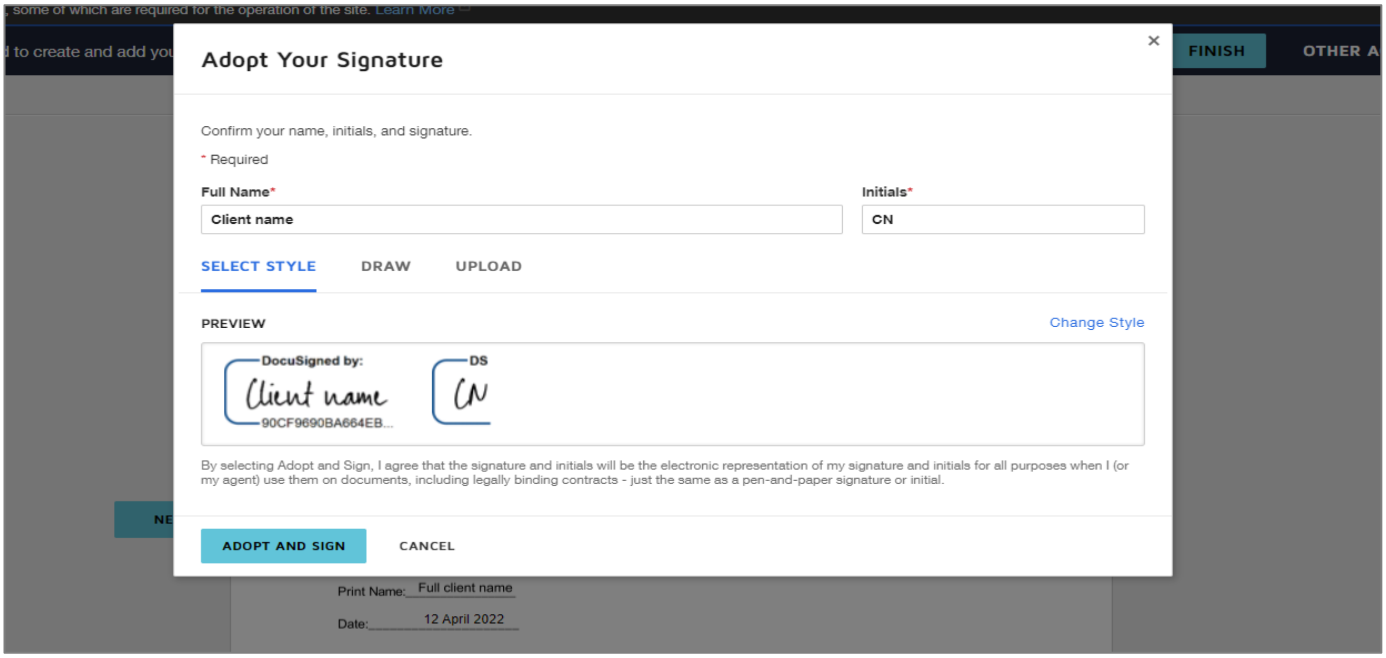
3. If you click start on the left, it will automatically take you to the signing sections. As the client, please make sure you read and understand the terms and conditions of the agreement before signing.



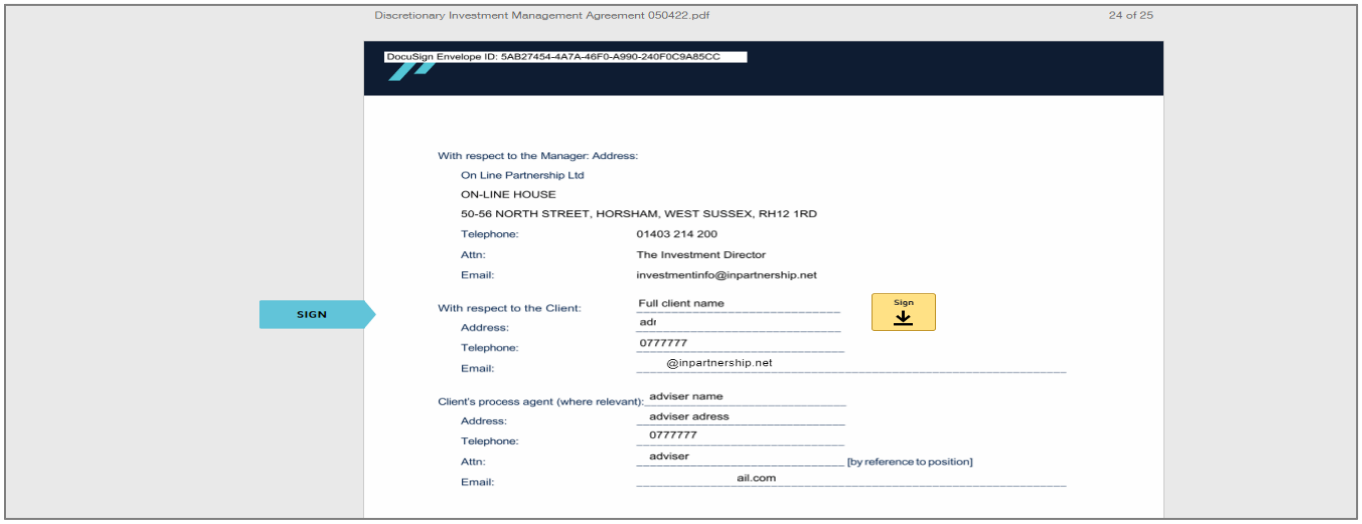
4. The first section you will need to fill in is the title information. This is a drop-down where you can pick the appropriate category.



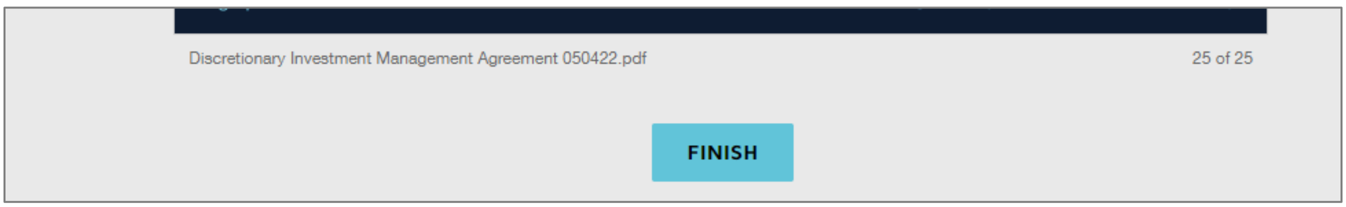
5. Then to sign, please click the **sign** button, where you will be redirected to the screen below. Here you can adopt a DocuSign font, draw the signature, or upload your signature. Either option will be valid.



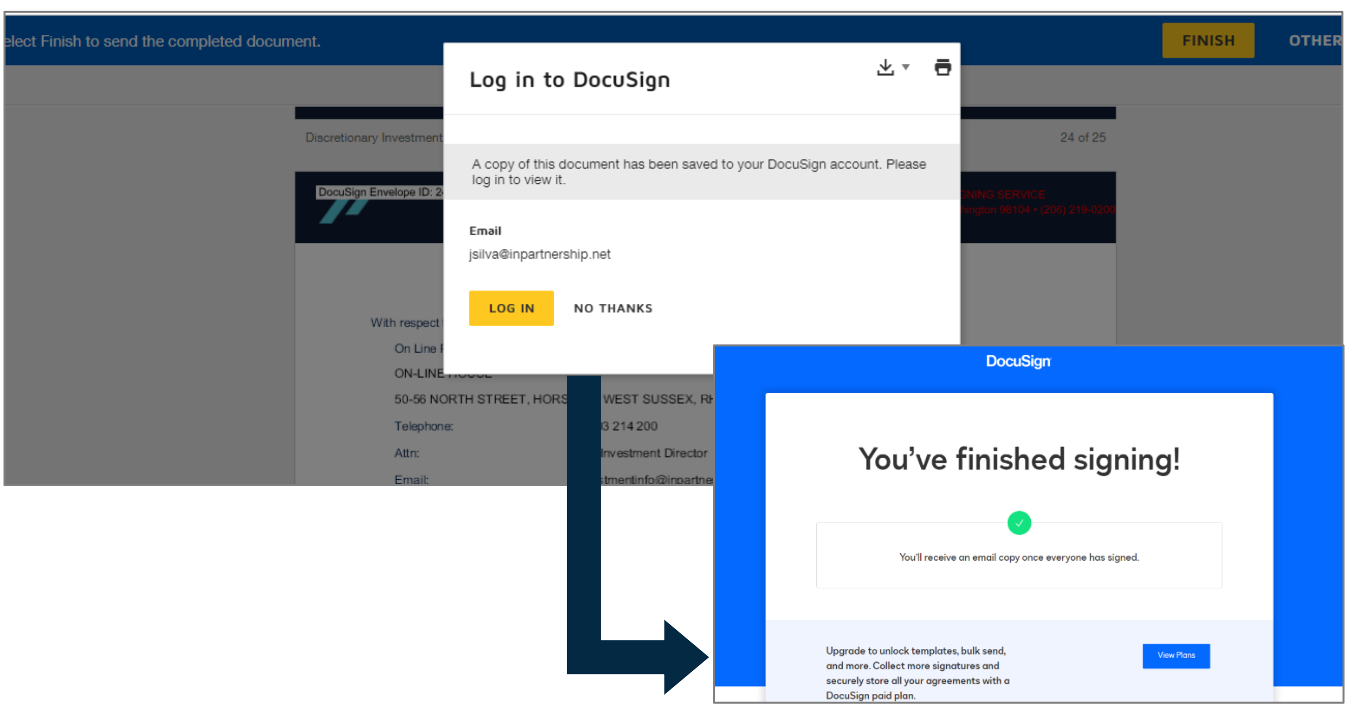
6. Please check the information provided by the adviser is correct, and you can <u>sign</u> on the right in the same way as step 5.



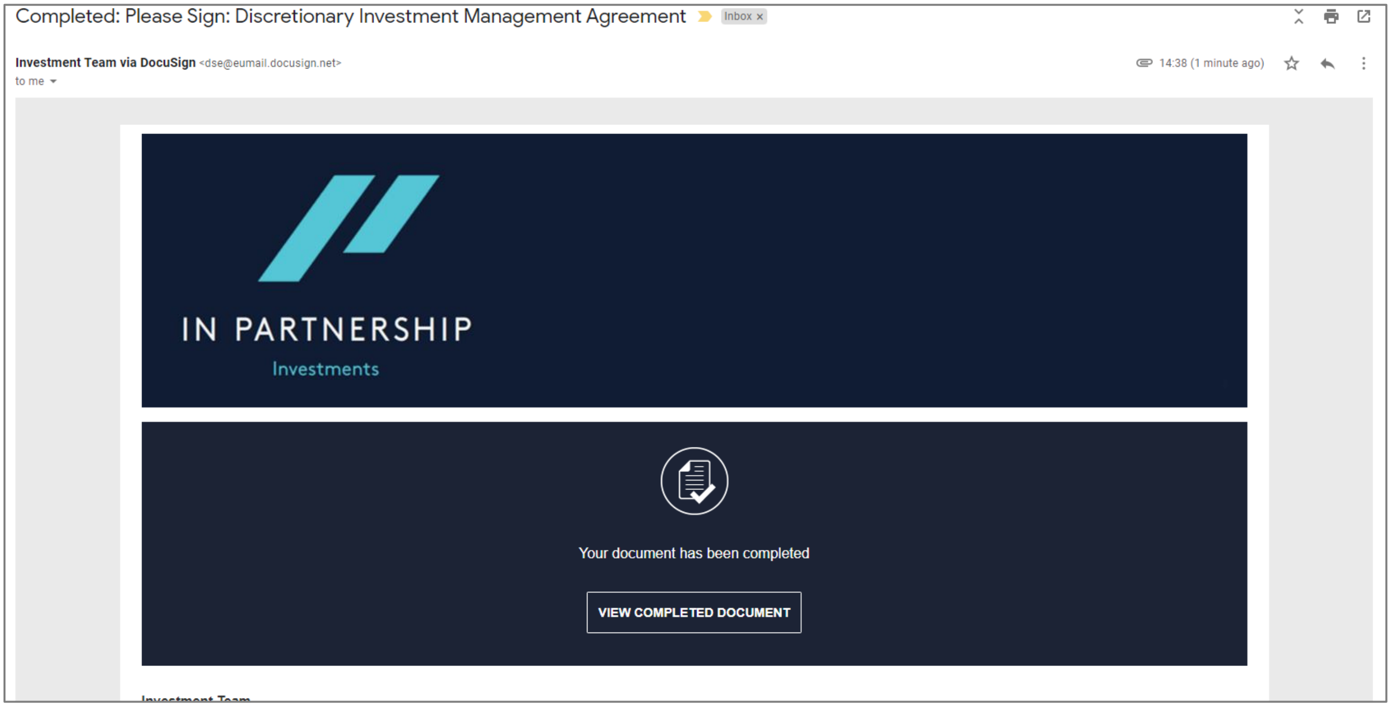
7. After confirming the content of the agreement is correct, please click <u>finish</u>.



8. You do not need a DocuSign account to complete the signing process. Although if you would like to generate an account or you already have an account with DocuSign, you can log in at this stage. Please click the appropriate option. If you do not wish to get redirected, you can click <u>no thanks</u>. And the final confirmation screen will appear.



9. The final copy of the signed Investment Management Agreement and the Certificates of Completion are sent to the client, investment team, and the adviser.



Any additional questions can be directed to the Investment Team, investmentinfo@inpartnership.net

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