Adviser/Administrator Process Guide

[Discretionary Investment Management Agreement]

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

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

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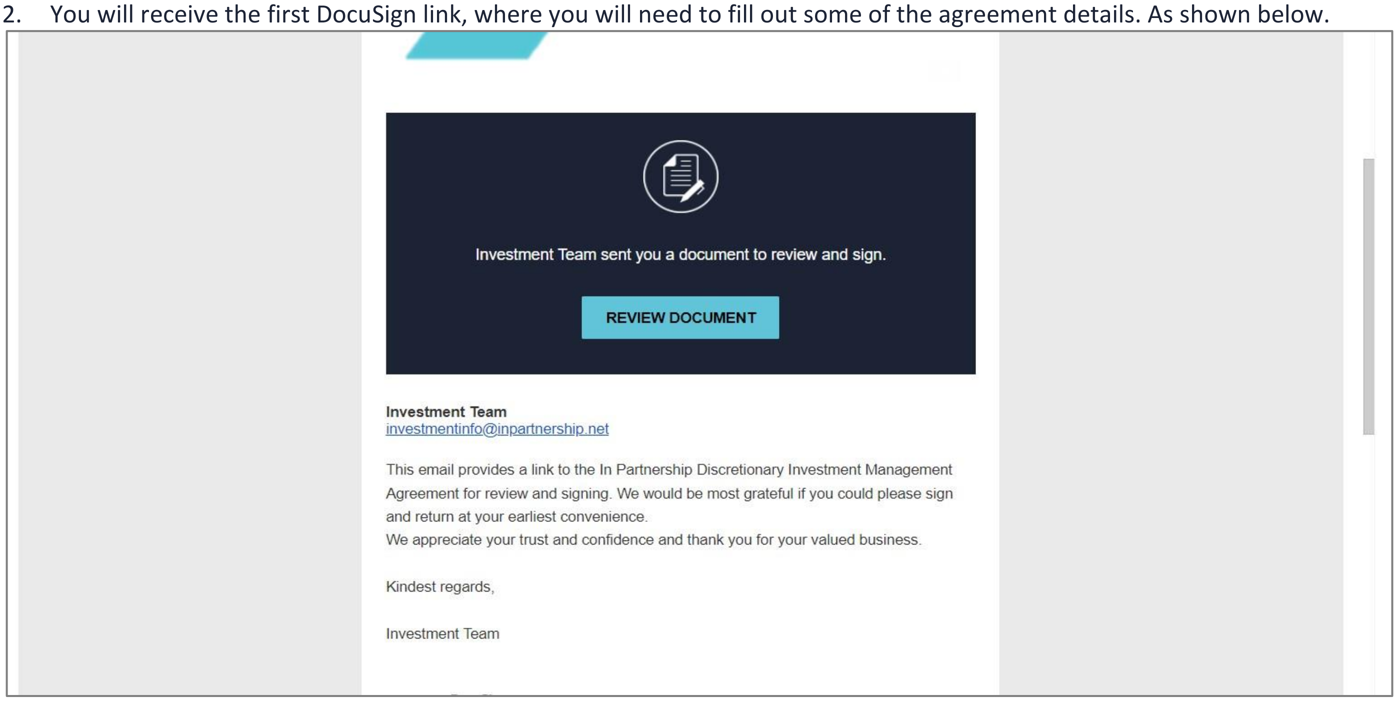
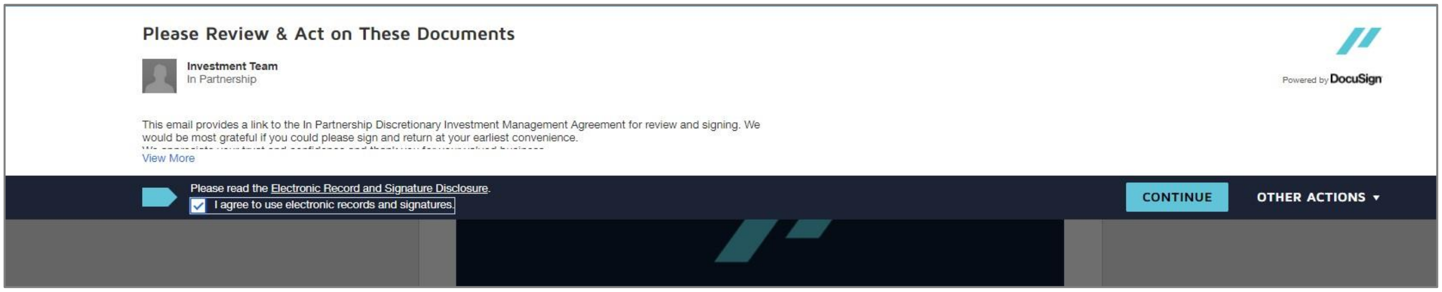
1. Firstly, as part of the administrative team or the adviser, you should send a request for the DocuSign link to investmentinfo@inpartnership.net. The email should include the adviser's name and confirm the email address being used to process the agreement, either the advisers' email or the general administrative team email.

2. You will receive the first DocuSign link, where you will need to fill out some of the agreement details. As shown below.

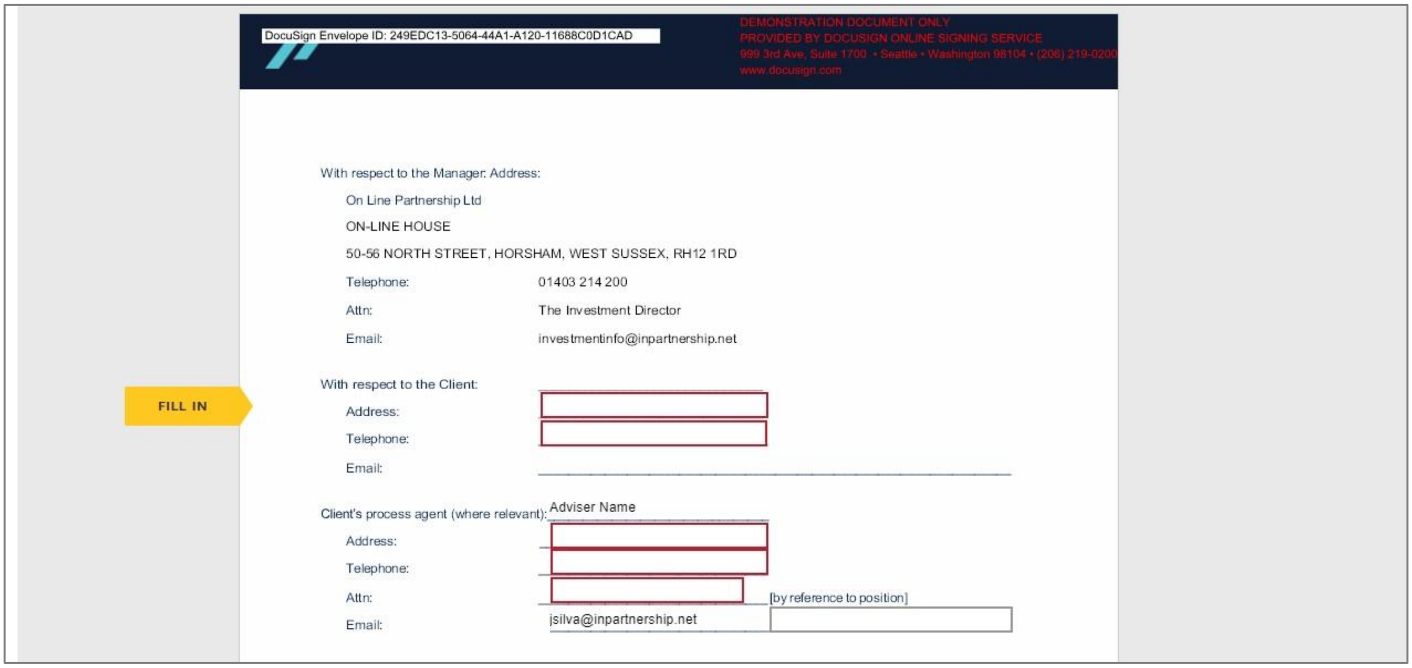


3. After ticking that you agree to use electronic records and signatures, press continue and click start on the left. This will automatically take you to the relevant sections to fill in the details.



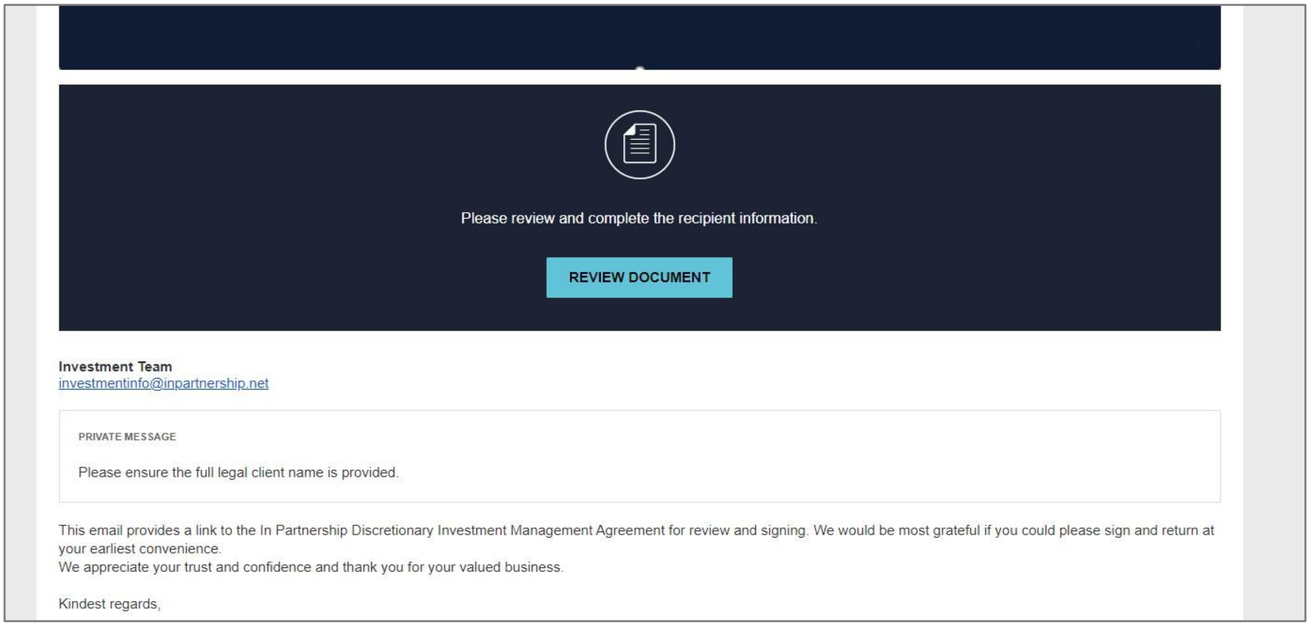
4. Please type in the Client's Full legal name here.

5. The client's address should be filled in, cross-referencing against their identification documents. Please note the clients' email will be automatically filled in when the adviser specifies the recipient later in the process.

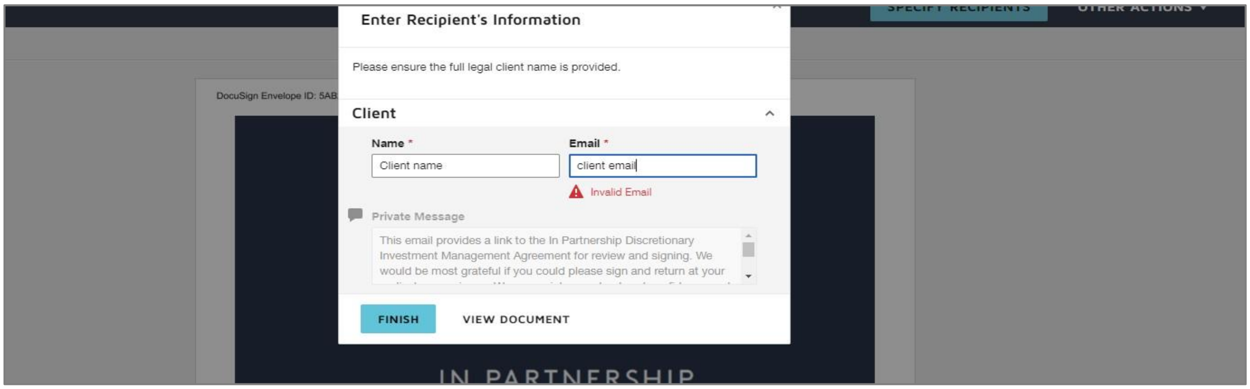


6. Finally, click <u>finish</u> to complete the adviser signing process and the final confirmation screen will appear.

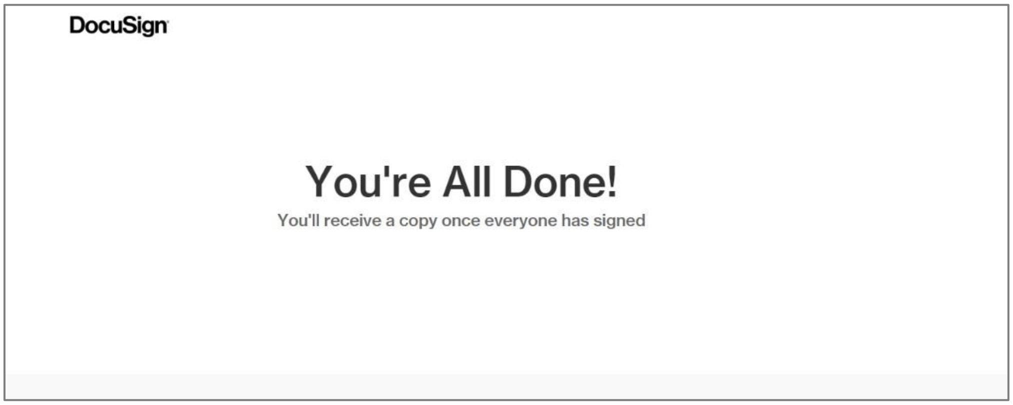
7. You will then receive the second link with the final agreement to go to the client. They should click review document again to specify the recipient, which in this case is the client.

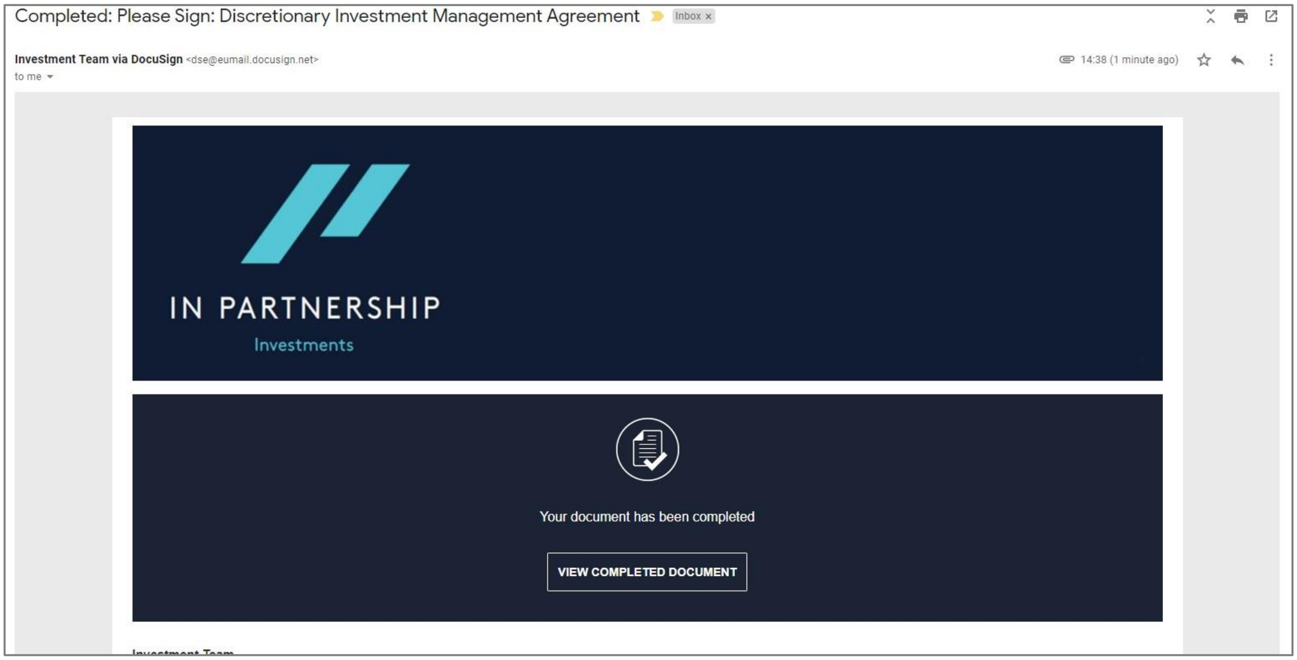


8. The adviser will be redirected to the following page. The clients' name and email must be populated, Please ensure the correct client email is used here. We advise reviewing the document by clicking <u>view document</u> to identify potential errors before the agreement is sent to the client. Clicking <u>finish</u> will send the agreement to the client.



9. The clients' signing process details are included in the Clients DocuSign Process guide. Once the client has signed, the final copy of the signed Investment Management Agreement with the Certificates of Completion are sent to the Client, Investment Team, and the Adviser/Admin email.





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

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