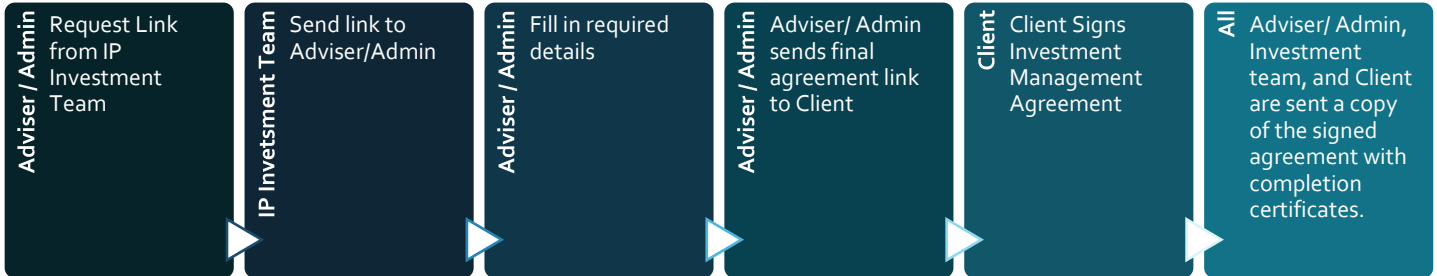




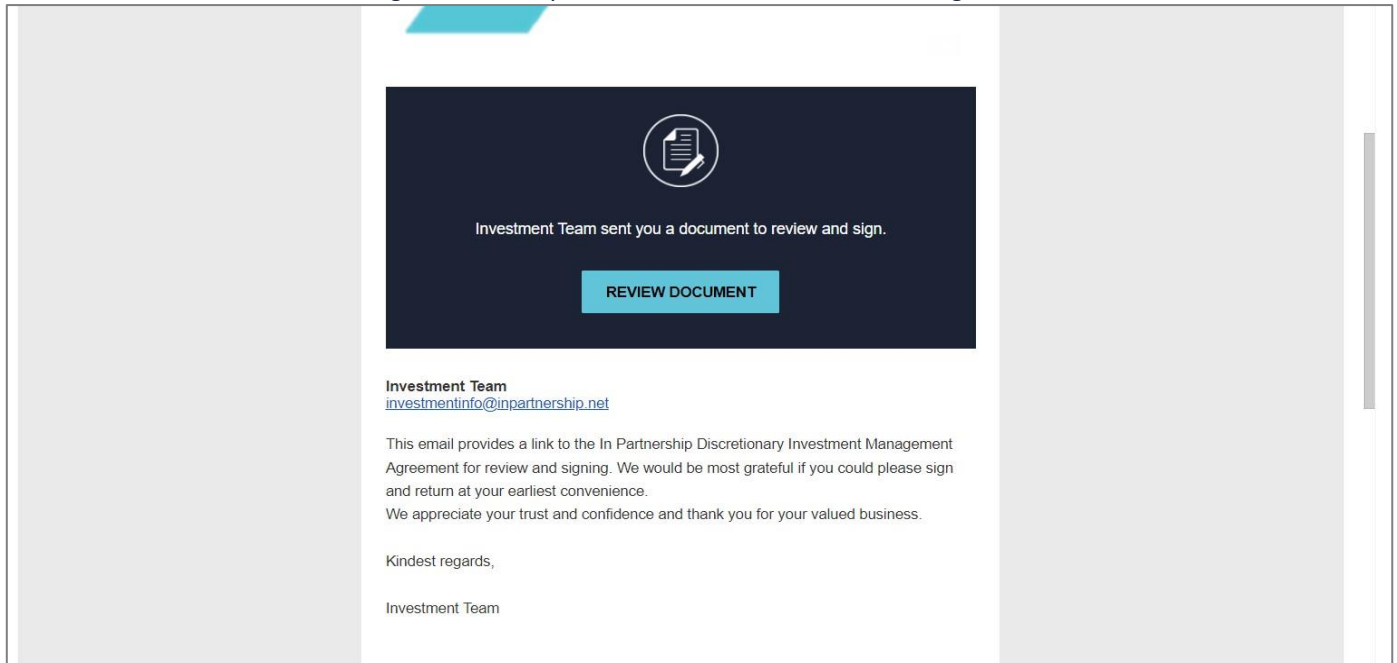
Adviser/Administrator Process Guide

[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:



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.

Please Review & Act on These Documents

Investment Team
In Partnership

This email provides a link to the In Partnership Discretionary Investment Management Agreement for review and signing. We would be most grateful if you could please sign and return at your earliest convenience.
[View More](#)

Please read the [Electronic Record and Signature Disclosure](#).

I agree to use electronic records and signatures

CONTINUE OTHER ACTIONS ▾

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

DocuSign Envelope ID: 5AB27454-4A7A-46F0-A990-240F0C9A85CC

DISCRETIONARY INVESTMENT MANAGEMENT AGREEMENT

between

The On-Line Partnership Limited

And

Required - Client Full Legal Name

FILL IN

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.



DocuSign Envelope ID: 249EDC13-5064-44A1-A120-11688C0D1CAD

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
699 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200
www.docusign.com

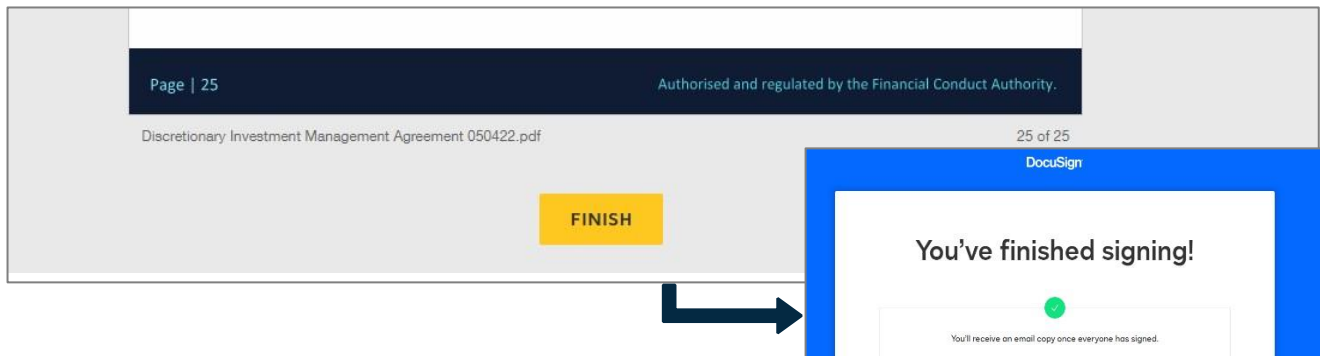
With respect to the Manager, Address:
On Line Partnership Ltd
ON-LINE HOUSE
50-56 NORTH STREET, HORSHAM, WEST SUSSEX, RH12 1RD
Telephone: 01403 214 200
Attn: The Investment Director
Email: investmentinfo@inpartnership.net

FILL IN

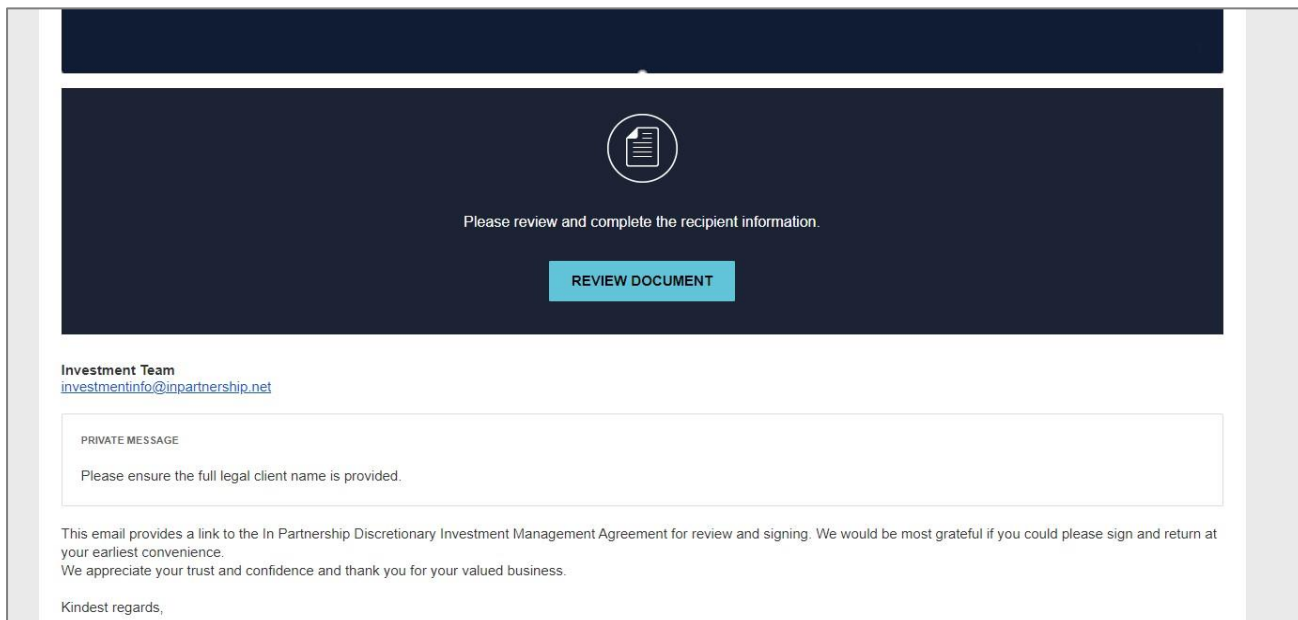
With respect to the Client:
Address:
Telephone:
Email:

Client's process agent (where relevant): Adviser Name
Address:
Telephone:
Attn: [by reference to position]
Email: (jsilva@inpartnership.net)

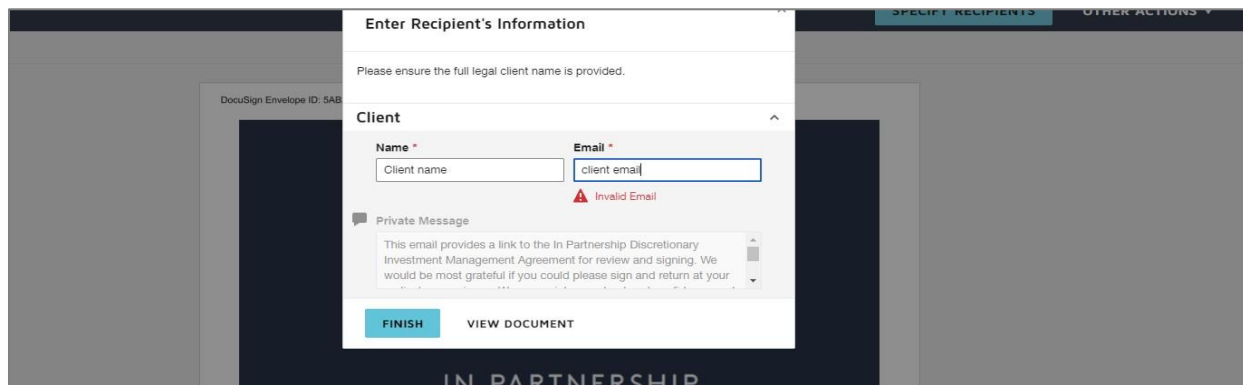
6. Finally, click finish to complete the adviser signing process and the final confirmation screen will appear.



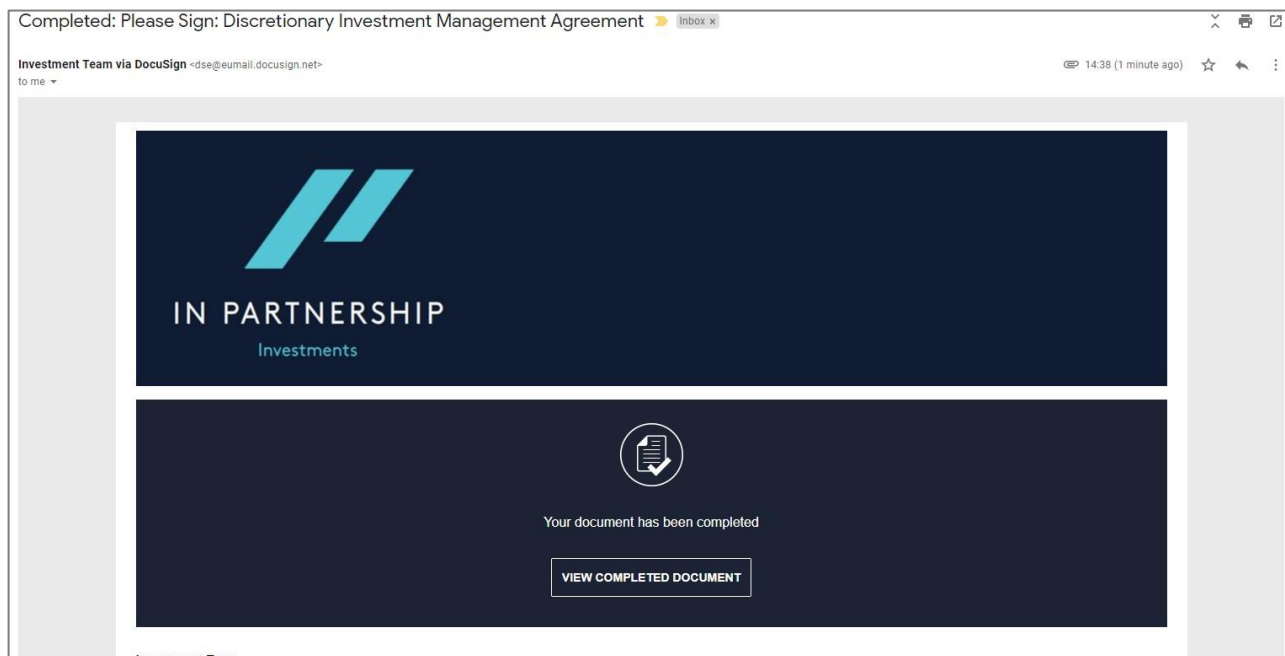
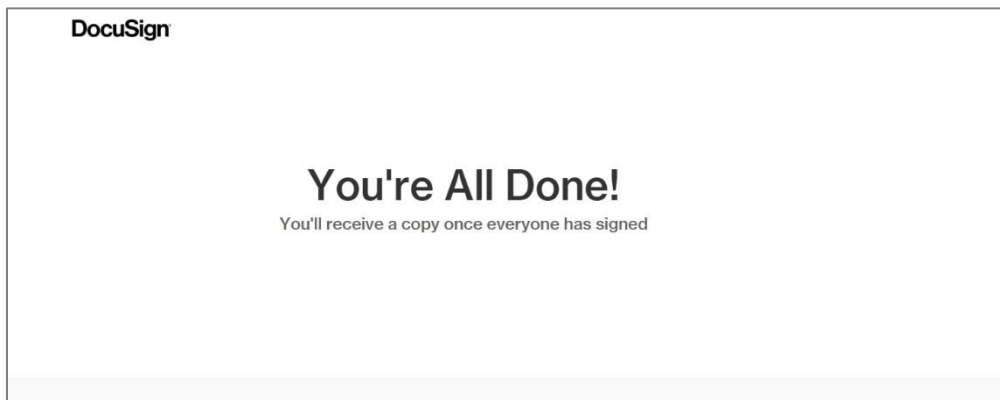
7. You will then receive the second link with the final agreement to go to the client. They should click review document again to specify the recipient, which in this case is the client.



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 [view document](#) to identify potential errors before the agreement is sent to the client. Clicking [finish](#) 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

-END-