

Accepting DocuSign signatures

Due to the COVID-19 health crisis, Foresters Financial™ is pleased to announce the acceptance of DocuSign¹ as the only e-signature platform that can be used for any forms or questionnaires required after the initial application is submitted and for any delivery requirements for any of our products.

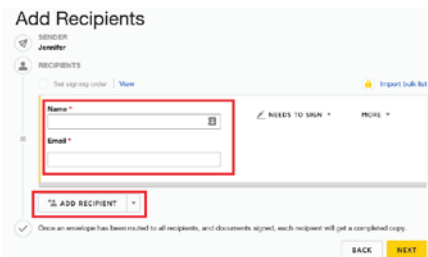
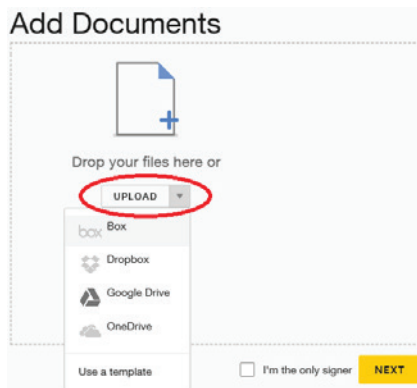
DocuSign cannot be used to obtain signatures on the initial application. For the initial application, e-signature is only available through iPipeline's e-App² process and their approved signature methods.

How to use DocuSign with Foresters?

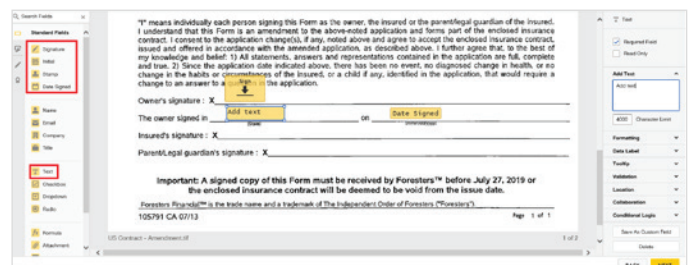
1. Obtain any Foresters documents requiring signatures:
 - a. **Pre-issue outstanding requirements after the initial application** such as forms or questionnaires: The producer will download any required New Business documents from ezbiz as they currently do today.
 - b. **Delivery requirements:** The producer will receive their client's delivery requirements via secure email if eligible or by mail if not eligible for e-delivery.
4. Indicate who needs to sign the document by adding the client's name and email address. If the Owner/ Insured/Payor are different and all parties require a signature, simply add each party's name and email address and identify the order in which they should sign the document.

2. Speak with your client to obtain the necessary information to complete the document and then scan or save the document to a PDF file. To ensure that your business is processed in a timely basis, please do not use the same device as your client for DocuSign e-signatures.

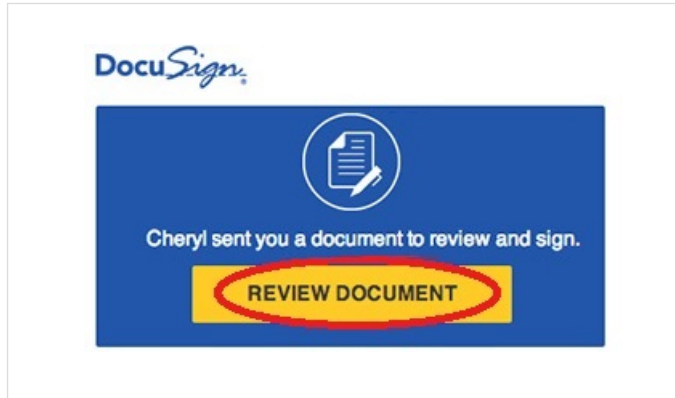
3. Upload the PDF file to DocuSign



5. Place required signature fields into DocuSign, by dragging and dropping the DocuSign fields into the document, to indicate where the Owner, Insured or Payor should sign. Once all fields are created, send the document to the recipients within DocuSign. Once sent, producers can track the document status using the DocuSign dashboard.



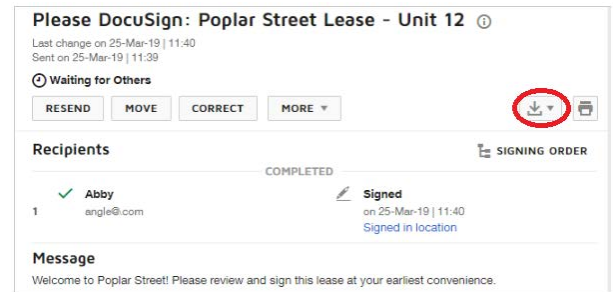
6. Recipients will receive an email from DocuSign, which will include a link to access the document. Once the link is clicked, they will follow the DocuSign tabs and simple instructions to guide them through the signature process. After the document is signed, the recipient clicks "Finish" to complete the process. It's important to note that these electronic signatures are secure and legally binding.



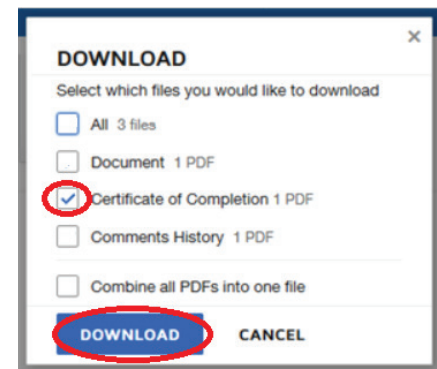
7. Once signatures are obtained from all required signing parties, the producer can download the completed document from DocuSign. Completed documents can be submitted to Foresters by uploading to SecureDocs, responding to Foresters secure email (for delivery requirements only), fax or mail. **A copy of the Certification of Completion, provided within DocuSign, must be submitted to Foresters along with the appropriate signed document.** Failure to include a copy of the Certification of Completion will delay business from being processed in a timely basis.

8. To access the required **Certification of Completion from DocuSign for your desired client**, select Manage from the top navigation toolbar, then either search, filter or simply scan the list for your client's email:

a. Once the email is located, open the email to show the detailed view and then select the download button.



b. Select Certificate of Completion as the desired file, select the download button and save the PDF file to the desired personal folder.



1. DocuSign is a third party vendor that is not supported by Foresters. Questions regarding DocuSign should be referred directly to DocuSign Customer Support at (800) 379-9973.
2. e-App is available in all states through the iPipeline iGO e-App platform using Internet Explorer (desktop/laptop) or Safari (Apple iPad only) for Foresters non-medical and medical products (excluding Foresters PlanRight). Touch to Sign is available on Apple iPad only. POS decision will be unavailable Monday to Saturday from 2:00 a.m. to 6:00 a.m. and from Saturday 10:00 p.m. to Sunday 10:00 a.m. (EST). Some e-App features are not available in NY (refer to ezbiz for more details).

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