

## The End of Signing on the Dotted Line

Written by Grant Maddox  
Tuesday, 28 August 2018 10:59

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We all lead busy lives, so it's important to save time and maximize efficiency whenever we can. The new eSignature feature from Charles Schwab allows you to review, electronically sign, and send back eligible forms to us, making a variety of processes quicker and easier than ever before.

At DWM, we always stay up to date with the latest technology and keep you informed, so we can ensure the best possible experience for our clients. As we learn more about today's changing technology and the need to stay on top of cybersecurity, going digital allows sensitive client material to remain safely guarded, as well as providing an easier, less burdensome and more accurate onboarding process for everyone.

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eSignature is accepted on many new account applications, maintenance forms, and managed account forms, such as:

- Schwab One Personal accounts
- Schwab One Trust Accounts
- Company Retirement Accounts (CRA/Pension Trust)
- Custodial/Minor IRA Applications
- Account Closure Forms
- Designated Beneficiary Plan Agreements
- Investor Checking Accounts
- IRA Distribution Forms
- MoneyLink Applications
- Transfer Your Account (Into or Out of Charles Schwab)

This time-saving eSignature feature is extremely efficient, and it's easy to use, too! Simply follow the steps below and you'll be well on your way to mastering electronic signatures.

1) When expecting a form for eSignature, keep an eye out for an email from Charles Schwab that states "Documents for Your Electronic Signature."

2) Click "Review Documents" at the bottom of that email.

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eSignature Notification

August 27, 2018

## Documents enclosed for your review and eSignature

Sent on behalf of your independent investment advisor:  
DWM FINANCIAL GROUP INC ("Advisor")<sup>1</sup>

Your Advisor has asked Schwab to forward the enclosed documents for your review and signature using the DocuSign electronic signature service.

Once you have eSigned the documents:

1. Your Advisor will be notified. Your Advisor will review the documents and submit them to Schwab for processing.
2. You will receive a confirmation email.
3. Print or Download a PDF of the signed documents for your records.

To review and eSign the documents, click the button below.<sup>2</sup>

[Review Documents](#)

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## Adopt Your Signature

Confirm your name, initials, and signature.

\* Required

Your Full Name\*

GRANT MADDOX

Your Initials\*

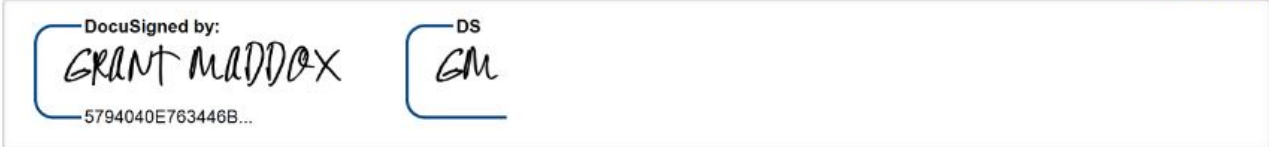
GM

SELECT STYLE

DRAW

PREVIEW

[Change Style](#)



By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

**ADOPT AND SIGN**

CANCEL

By clicking "Sign" you agree to the terms and conditions of the service. You will be notified by email when your signature is needed on a document. You can also view the status of your signature at any time.