

# Digital Signatures

There is a need to keep your financial advice business on track—and a need for technology that supports your entire service proposition.

Available via Client Portal, Digital Signatures allows your clients to sign documents digitally rather than with pen and paper. It's much quicker than traditional signing and more convenient. For example, a digital signature is useful when a client cannot physically visit their adviser's office, or when they don't have access to a printer and scanner.

Advice summary approved by client via the use of Digital Signatures.

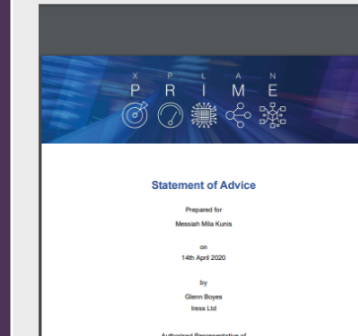
How Digital Signatures helps your business perform better



## Advice Summary

### Advice document

Please ensure all details have been adequately captured and you have a full understanding of the strategy and solutions recommended before implementing our recommendations.



### Digital Signature

Status: Complete

The advice document has been successfully signed.

[View details](#)

### Time efficient

Documents can be signed in minutes from anywhere, using any device.

### Cost effective

Save money and time on printing, postage, and re-keying data.

### Simple workflow

Managing and tracking signed documents is quick and easy.

### Safe & secure

With a one-time pin and audit trail you can be sure all documents are protected, signed and transmitted securely.

# About Iress

Iress is a technology company providing software to the financial services industry. Our software is used by more than 9,000 businesses and 500,000 users globally.



18 offices



9 countries



2,011 people

## Perform better

To find out how Digital Signatures can help your business perform better, please visit:

[iress.com/digital-signatures](https://iress.com/digital-signatures)



# Digital Signatures

Secure signing. Every time.

## Full monitoring

You can monitor the status of all Digital Signatures in one place. Here you can filter documents and export results.

## Safe & compliant

Each signature is permanently recorded in the audit trail with details including date and time stamp, IP address and SHA-256 hash of the document. The audit trail also logs records of any signatories who have declined to sign the document or any users who have terminated the Digital Signatures process by voiding the document.

## Signatory usage reporting

CSV downloads of user-licence usage include records of the number of documents signed over a defined date range.

## Client experience

Digital Signatures is available with Client Portal, providing a convenient way for your clients to read and digitally sign documents via a secure and trusted login. This also ensures the client retains ongoing access to the document for future reference.

## How to access

To access and use Digital Signatures, you will need Xplan and Client Portal. Your account manager will be available to work closely with you to set these up.