



## DESKTOP GUIDE TO ROYAL LONDON'S ELECTRONIC SIGNATURES

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### 1. Electronic signatures and where you can use them.

Electronic signature is a new service within our Quote & Apply system which allows you and your clients to securely sign the Declaration and Consent Form for applications electronically. Signatures which are provided in this way have the same legal standing as traditional 'wet-signatures' and can save time for you and your clients.

You can use electronic signatures to sign Declaration and Consent Forms including the SEPA Direct Debit mandate with Royal London.

You can now complete the whole application from start to finish electronically, removing the need to be face-to-face with your clients. Our new online service is quicker, secure and ensures that customers can review their agreed transcript and easily sign their Declaration and Consent Form, all without having to worry about printing or posting anything.

### 2. How to use electronic signatures?

#### a) Selecting to use electronic signatures.

After you have agreed that your client(s) would like to sign their Declaration and Consent Form by electronic signature, you complete the online application within our Quote & Apply system, through to the 'Your Instructions' page.

It's important to note that to use electronic signatures you must have the email address and mobile number of your client(s) and it is vital that they are entered correctly into the system. If there is more than one life covered by the policy each client must have their own mobile number but the same email address can be used for the two clients. Then you simply follow the steps below:

1. Select 'NO' to the question 'Do you have a signed Declaration & Consent Form and SEPA mandate?'

Do you have a signed Declaration & Consent form and SEPA mandate?

YES

NO

2. Select 'YES' to the question 'Do you want to use our Electronic Signature process to arrange for the signing of the documents?'

Do you want to use our Electronic Signature process to arrange for the signing of the documents?

YES

NO

3. The following pop up window will appear confirming that electronic signature is being selected for this application. It's important to note, once you progress further into the application you can't change your mind.

Tick the box and carry on.

### Electronic Signature Confirmation

If you choose the Electronic Signature option, you **MUST** have an email address and mobile phone number for each client. You will be unable to use the Electronic Signature option if you do not have these details.

Please note that once you progress past this screen, you will NOT be able to change your mind.

If you wish to continue with the Electronic Signature option, just proceed when you close this window. However, if you are unsure or do not have an email address and mobile phone number for each client, please choose "No" to the Electronic Signature option and progress as a normal non-Electronic Signature application.

Please click here to confirm that you understand these requirements, and to close this window and proceed with the application.



If you do not wish to use electronic signature, once you tick the box and the window closes select 'NO' to the question 'Do you want to use our Electronic Signature process to arrange for the signing of the documents?'

4. Answer the rest of the questions and click 'SUBMIT TO FINAL STEP'.



### Requirements for Broker Signature Upload

1. The Broker Signature file must be in png, jpeg or jpg format, with a maximum size of 100kb.
2. The height and width of the file must have an aspect ratio of 1:3.
3. The Broker Signature must be on a clean white background with no other marks or distortions.

3. Ensure you tick the box to save your uploaded signature so it can be used for future applications. Click 'UPLOAD & CROP'.

You'll only have to upload your signature the first time you use the service, from then on it can be stored for all future applications. You access it by selecting the 'Use Previously Uploaded Broker Signature' option.

### Broker Signature - Click to choose



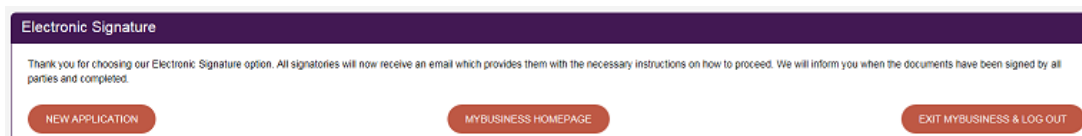
### Confirm your client(s) contact details.

4. In the 'Confirm Customer Contact Details' section check that your client(s) details are correct; click 'UPDATE' if you need to change them. Click 'PROCEED'.

Please note that you will not be able to change these contact details once you leave this screen.

Signature	Email	Mobile No.*	
John Client	john.client@gmail.com	0861234567	<button>UPDATE</button>

5. You now have the option to go to a 'NEW APPLICATION', the 'MYBUSINESS HOMEPAGE' or 'EXIT MYBUSINESS AND LOG OUT'.

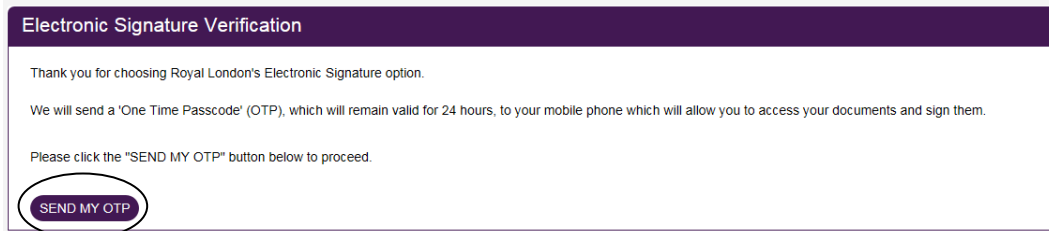


### c) How your client(s) sign using electronic signature.

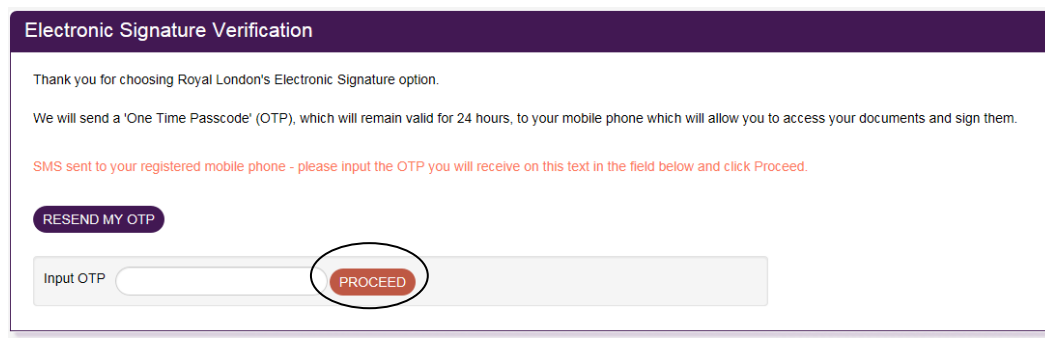
At this point your client(s) will have received an email from [electronicsignature@royallondon.ie](mailto:electronicsignature@royallondon.ie) with instructions on how to sign the document using electronic signature.

1. Your client(s) will click on the hyperlink within the email.

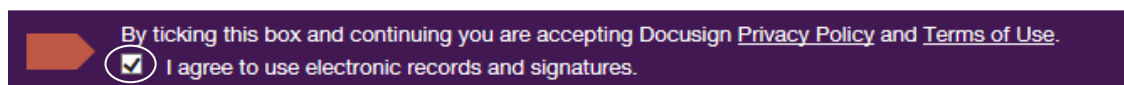
2. They select 'SEND MY OTP' on the 'Electronic Signature Verification' screen. This will send a One Time Passcode (OTP) from Royal London to your client's mobile phone which is valid for 24 hours.



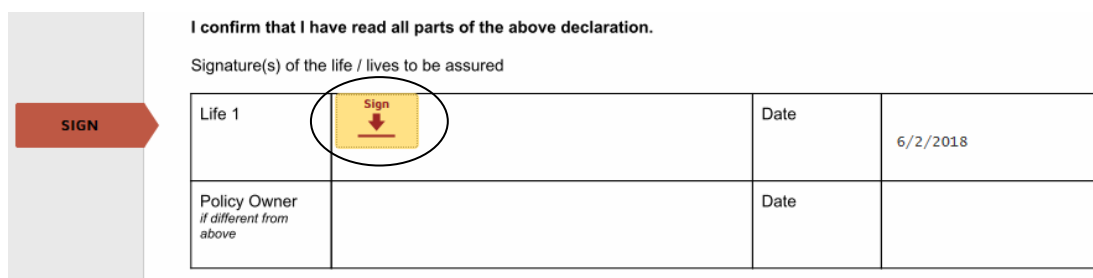
3. Your client should enter the OTP and select 'PROCEED'.



4. Your client will be brought to the application transcript. To view it they must tick the box to agree to the terms and conditions and click 'CONTINUE'.



5. Your client can then review the transcript and sign the Declaration and Consent Form. When they are ready to sign, clicking 'START' will bring them to where their signature is required and they should then click 'SIGN'.



6. Their electronic signature will automatically populate and they just need to click 'ADOPT AND SIGN' to insert it. If the client's SEPA details were included on the application they will also be directed to sign the SEPA mandate.

## Adopt Your Signature

Confirm your name, initials, and signature.

\* Required

Full Name\*

John Client

Initials\*

JC

SELECT STYLE

DRAW

UPLOAD

PREVIEW

Change Style

DocuSigned by:

John Client

1430281AF3B0484...

DS

JC

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

If they are signing from a mobile or tablet device they will be prompted to draw their signature and click 'SIGN'.

7. Click 'FINISH'.

8. Your client will then see the below message and can choose to close the window to Exit or go to the Royal London homepage.

### Thank you

Once again, thank you for choosing Royal London's Electronic Signature option. You have successfully signed your documents.

We will send you an email which will allow you to access and save a copy of the signed documents for your records once they have been signed by all signatories.

Please close this window to EXIT, or if you would like to go to the Royal London homepage, please click here

HOMEPAGE

This process is the same for each individual if more than one client's signature is needed.

9. Your client will receive automated emails reminding them to sign.

Once the document has been successfully signed your client(s) will receive an email from [electronicsignature@royallondon.ie](mailto:electronicsignature@royallondon.ie) giving them access to the fully completed documents. Like before, they must follow Section c) points 1-4 in order to view and save a copy for their records (please note that access remains valid for 30 days).

You will receive an email notifying you that the documents have been fully signed.

The final document, signed by you and your client(s), will be saved in our online system.

You can keep track of your applications which have been signed via electronic signature by logging into Quote & Apply and selecting 'Click here to view your Electronic Signature Applications'.

ROYAL LONDON

Welcome Tom Broker | Logout | Contact | Legal & Cookies | My Account | Broker Centre

Search Policy Number

MyBusiness Home | New Application | Save Application

**Product & Client**

- Product Selection (selected)
- Proposal Input
- Quotation Input
- Personal Details
- Address
- Policy Ownership
- Locust Details

**Underwriting**

**Completion**

Hello, Tom Broker, Welcome to Quote & Apply

**User Details**

Email Address**	tom.brooker@gnail.com	<a href="#">CLICK TO CHANGE</a>
Agency Code**	ZZZ90093	<a href="#">CLICK TO CHANGE</a>
Royal London Consultant	Blank It Default	

[Click here to view your Saved & Transferred Applications](#)

[Click here to view your Electronic Signature Applications](#)

**Product Selection**

Please choose your Product Type:

Mortgage Protection	Term Assurance	Whole of Life Assurance	Pension Term Assurance	Income Protection
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