

Maintain your 'business as usual' with e-signatures & Hansard Online



HANSARD
WORLDWIDE

As the news coverage of the spread of COVID-19 gathers pace around the world, there is an understandable feeling of concern, panic & confusion.

Government advice is unequivocally clear – reducing social interaction to an absolute minimum is essential in helping to contain the virus, and that we should make steps to limit face to face exchanges where possible.

As a financial advisor, however, your business is dependent on providing a very personal client experience, often requiring interaction via regular meetings with your existing and prospective new clients.

New business, made easy

It is during unprecedented times such as these, that you can turn to Hansard's technology to enable you to continue your 'business as usual', and provide your clients with a level of service and continuity that they may need now more than ever.

Our acceptance of electronic signatures, coupled with the award-winning performance & functionality of Hansard Online enables you to submit everything required for us to process & issue your future cases, without you having to obtain your client's signature via a traditional, physical meeting.

Our simple flow chart illustrates the high-level process, & a separate administration guide is available from our regional support teams, detailing specific information regarding any additional documentation required.

Future administration, made easy

The introduction of e-signatures not only makes new business submission extremely easy, it can also be used for future instructions from you and your client over the lifetime of a policy, facilitating:

- Surrenders
- Maturities
- Deaths
- Beneficiaries
- Fund Advisor / Service manager Fees
- Premium Holidays, Paid Up Requests or Change in premium levels/frequencies.

**INTERNATIONAL
ADVISER
GLOBAL FINANCIAL
SERVICES AWARDS '19**

WINNER

DIGITAL PROPOSITION

**LAST
WORD**

Using e-signatures with your client & Hansard couldn't be simpler, using DocuSign

1



Via your DocuSign account, upload & email the Hansard literature that you require to share with your client. Using an application form as an example, you could choose to either:

1. Pre-populate some/all of the required information on behalf of your client
2. Leave it blank, for them to complete on receipt

NB: Your client doesn't need to have DocuSign to receive your email/complete the next step.

Your client will receive an email from you, containing a link that they can open on their mobile device or PC.


2



The email will first ask them to acknowledge that they understand they are using E-Signatures, then they will review &/or complete the information provided (depending on whether you chose option 1 or 2 above) . Once complete, they will provide their digital signature, which can be done in one of two ways:

1. the client can provide either a 'free format' signature (by moving their mouse or signing it with their finger tip on their mobile device) or,
2. they can electronically stamp it, the system will then automatically place a signature in the required field.

'Free format' example

Applicant 1
DocuSigned by:

01042020

'Electronic stamp' example

Applicant 2
DocuSigned by:
John Smith
01042020

3



Once the above step is complete, your client simply clicks 'Finish' & you are alerted via email that their completed, signed documents are available for you to view via your DocuSign homepage or App.

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All that remains is for you to upload these documents to the Online New Business Tool on Hansard Online (along with any other certified documents required). You can follow the progress of this & any other applications via your 'Pipeline' report.

High Risk Factors

As part of standard process, and part of our client and transactional risk assessment we may, at times, identify high risk factors. In such a scenario, we reserve the right to reject an electronic signature or request additional information, and ultimately the right to contact the client for verification. For payments out, electronic signatures will only be accepted as default where the account is in the client's name and we have either made payment to the same account previously, or they are in a schedule C country.

Note: You should be comfortable that DocuSign is an appropriate E-Signature provider, following your own independent assessment and research.

Hansard Worldwide Limited

Incorporated in The Bahamas (no. 200975B) and authorised by the Insurance Commission of The Bahamas.

Email: global.support@hansard.com **Telephone:** +1 242 397 2120 **Website:** hansard.com/worldwide

Administration Centre for Correspondence: Harbour Court, Lord Street, Box 192, Douglas, Isle of Man, IM99 1QL, British Isles.

Registered Office: Sassoon House, Shirley St & Victoria Avenue, PO Box SS-5383, Nassau, Bahamas.