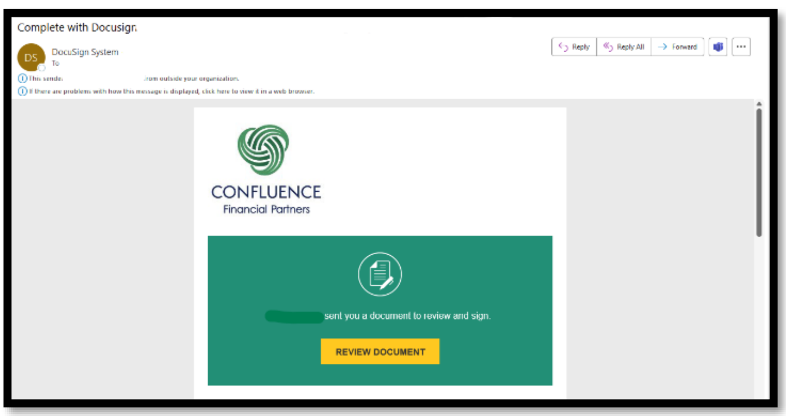
Using DocuSign to Complete New Accounts Paperwork

We're excited to welcome you as a client of Confluence Financial Partners, working with the Cashdollar team. —This document will guide you through the process of completing your new account paperwork using the DocuSign application.

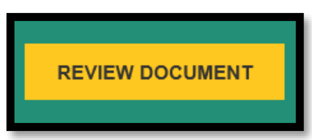
As always, please feel free to call our offices (724-458-5233) if you need assistance and have questions. Someone on our team will be happy to assist you.

<u>Step By Step Instructions</u>

1) A member of our team will send a series of emails to your inbox requesting your e-signature on several pieces of required paperwork. Typically, there are at least two emails, but there could be more. One email will direct you to sign documents for Confluence Financial Partners. Another series of emails will direct you to sign documents with our custodian, Raymond James.

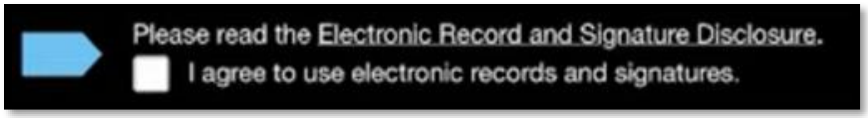


2) After you receive each email, click on the "Review Document" button.

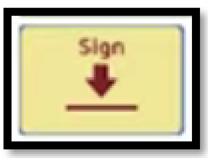


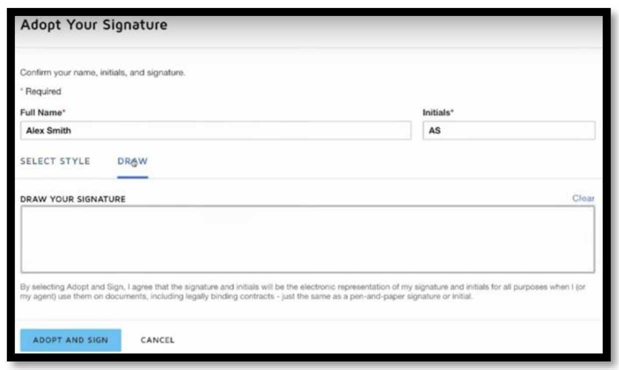
3) The DocuSign application will require you to utilize Mult-Factor Authentication to access each document. A text message with a verification code will be sent to your cell phone. Simply, enter the code that is sent to view the document. Be aware codes are only valid for a limited time!

4) Before you continue with the signing process, you will need to complete a check box, indicating that you accept the Electronic Record and Signature Disclosure. Now you can access the document(s) and take some time to review. The DocuSign application will indicate the pages that require signature with a "flag."



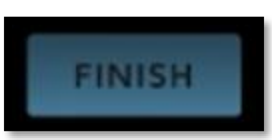
5) Once you are on the pages requiring signature, simply click the box that says "sign", and DocuSign will guide you through the process. If this is your first time using DocuSign, the application will ask you to "adopt a signature." You can use a pre-determined style or use your cursor to sign your name.

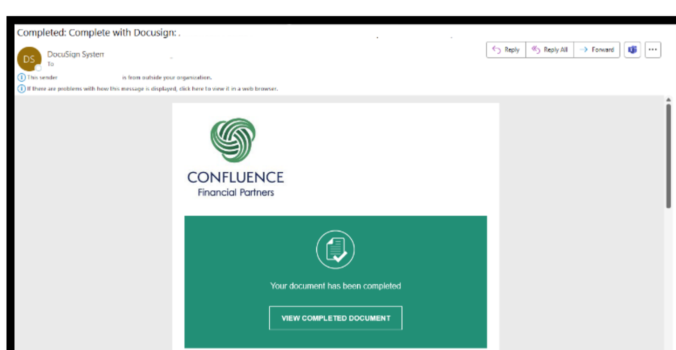




6) After you have adopted your signature and signed, select "Finish" to complete the document. Upon completion, DocuSign will ask you if you would like to set-up a free account. This can be done but is not necessary.

7) After all required signers have finished, including your Wealth Manager and the Confluence Chief Compliance Officer, you will receive an email indicating that the document has been completed and you can download a PDF. Your Wealth Manager will save a copy on file and begin the process of opening your accounts, according to the document instructions.





Please do not hesitate to reach out to us if we can help you with this process. Additionally, DocuSign provides the following help videos to help you with the process if you need it: https://www.youtube.com/watch?v=jqbo6yL9rE4