

## Quick Start Guide



## DocuSign

Electronic signature (E-signature) technology for investments and other transactions.

At Citi, we work hard to bring you all the convenience of digital technology while keeping your finances secure at all times. DocuSign gives you the freedom to manage your investments in an efficient, secure and completely paperless way.

### What is DocuSign?

Using advanced E-Signature technology, DocuSign allows you to review and sign documents electronically and submit them in hours rather than days using your mobile or tablet device.

#### **Security for every transaction:**

DocuSign is the only E-Signature company to be ISO 27001 certified (the highest level of global information security assurance available today) and each time you use DocuSign, a one-or-two-step authentication needs to be performed before the document can be accessed and signed electronically, giving you the assurance that DocuSign meets stringent international security standards.

#### **A clear and convenient record:**

DocuSign provides a complete audit trail to confirm the completion of your transaction, including your name, email address, authentication method and more.

### Who can use DocuSign?

#### Eligibility criteria

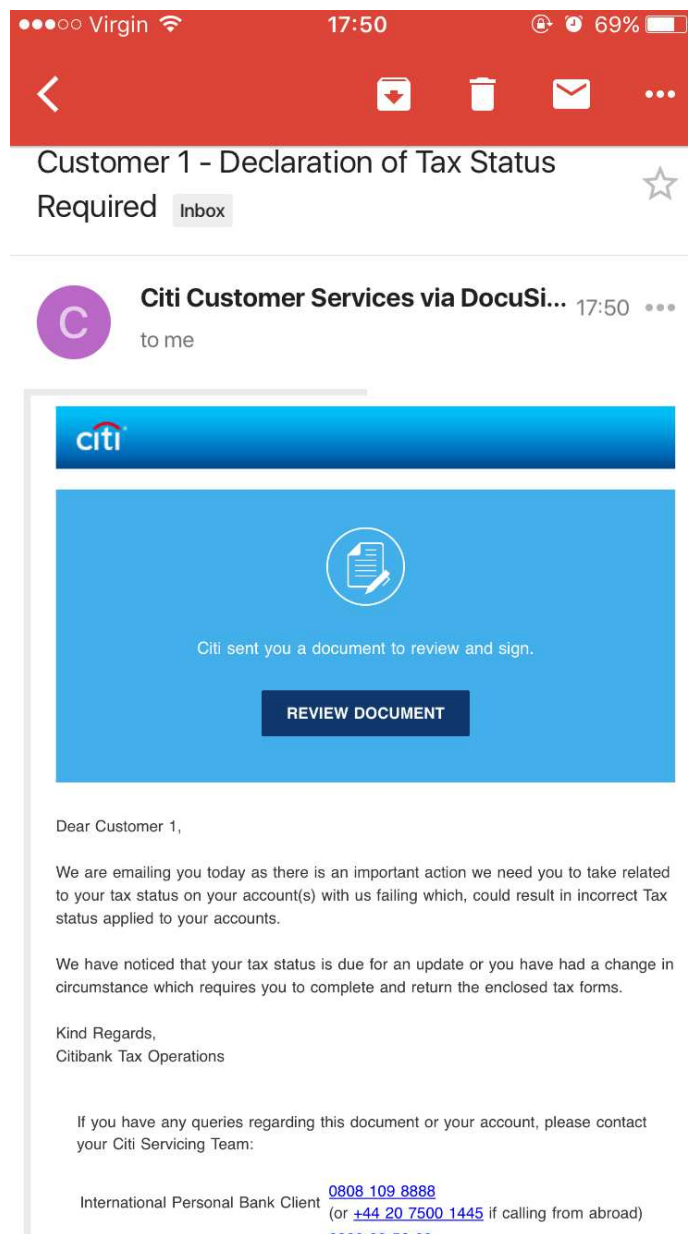
- DocuSign can be used by clients of Citi UK and Citibank International Personal Bank EMEA.
- Clients must have a valid email address and mobile number registered with Citi.
- The existing Terms & Conditions you signed when first opening a Citi account also apply to DocuSign. However, you will still need to provide consent to use the technology.
- DocuSign can be used for SOLE, JOINT/OR, and JOINT/AND accounts.
- For transactions executed under a JOINT/OR relationship, any one of the account holders may sign the transaction electronically using DocuSign.
- For JOINT/AND relationships, all account holders must sign the document electronically using DocuSign.

## How to use DocuSign

When you decide to complete and sign a document using DocuSign, we will send you an email that allows you to access the document. This email will come from either your Relationship Manager, CitiPhone Officer or Client Service Manager, or from Citibank Operations.

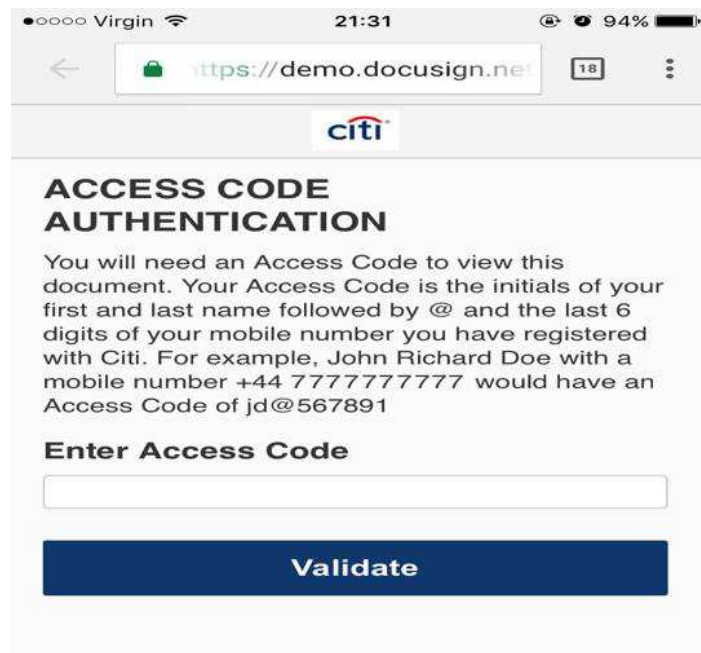
### Step 1: accessing your document

1. In the email, click on REVIEW DOCUMENT.
2. This takes you to a secure DocuSign website where you will be asked to perform a one-or-two-step authentication.

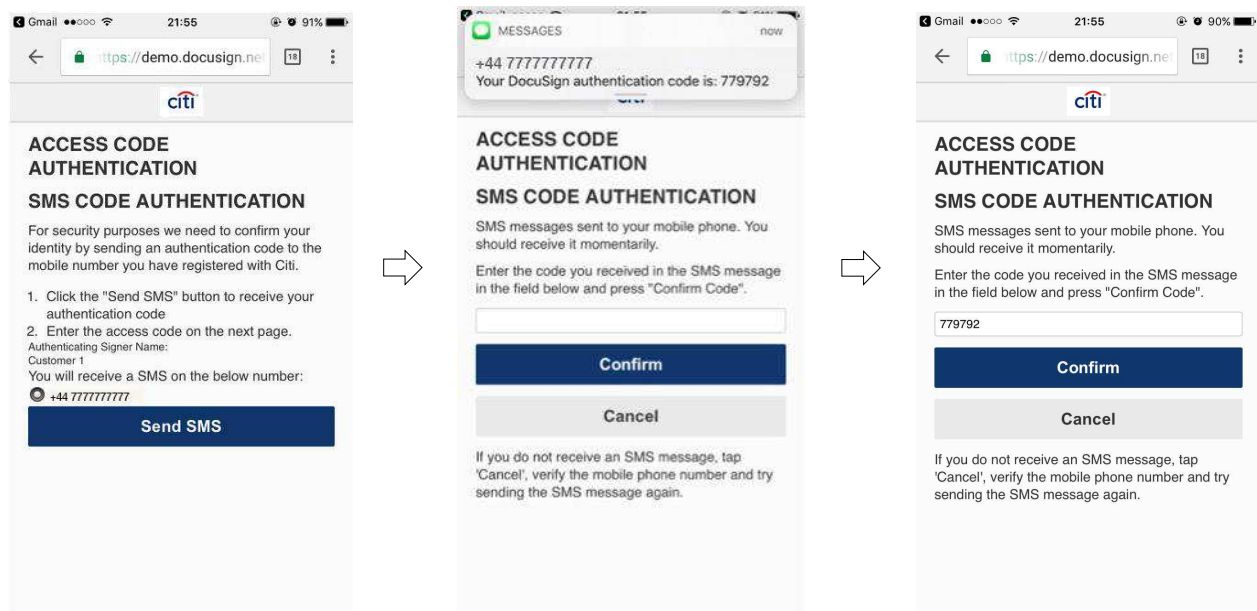


## Step 2: authentication

1. The first authentication method is an **access code**. Your Relationship Manager, CitiPhone Officer or Client Service Manager will advise you on this code.
2. You will further be advised on the secure DocuSign website as below.

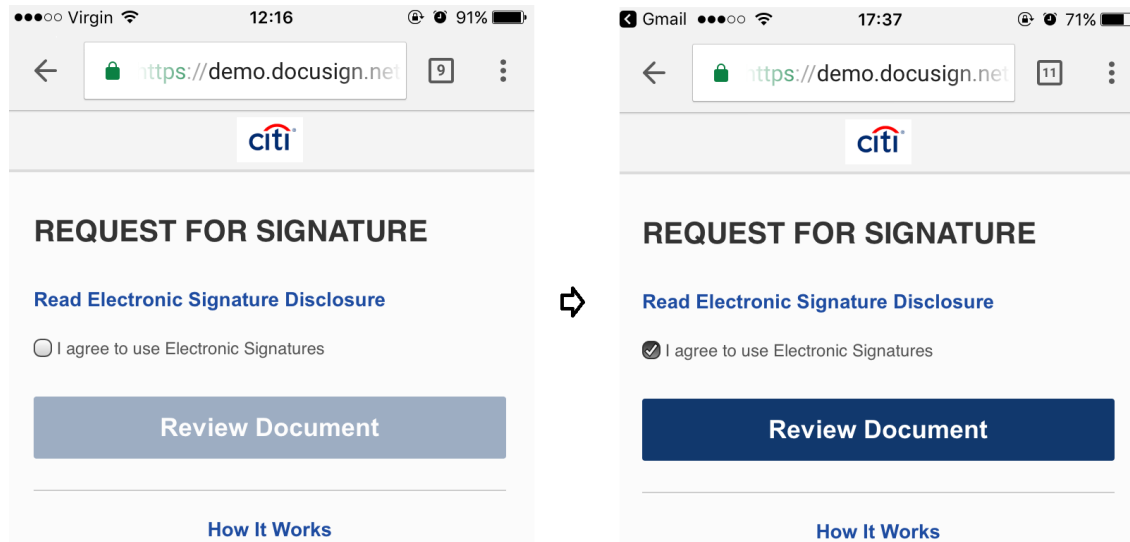


3. For certain transactions, a second authentication method is required for additional security. This will be a **One Time Password (OTP)** - a dynamic six-digit PIN that is sent by text message to your registered mobile phone. To receive your One Time Password, click the "Send SMS" link. You can then enter it online to complete the authentication process.



### Step 3: giving your consent

After completing the authentication process, you will see a notice requesting your **consent to receipt of electronic record and signature**. Once you've given your agreement, the document will be made available for you to review and sign.

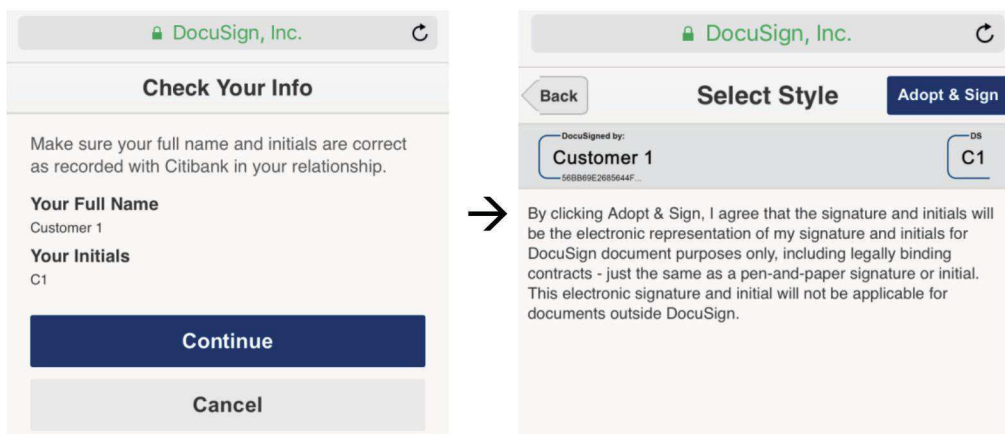


### Step 4: reviewing and signing the document

To review the document, click START. DocuSign lets you navigate between pages by clicking NEXT, or by scrolling.

Areas where a signature is required are indicated with the SIGN icon. When you first click on this icon, you will be shown the various styles of signature and initials that can be applied to the document.

When you've decided the style you prefer, click ADOPT & SIGN. This makes your selected signature or initial style the default style for the entire document.



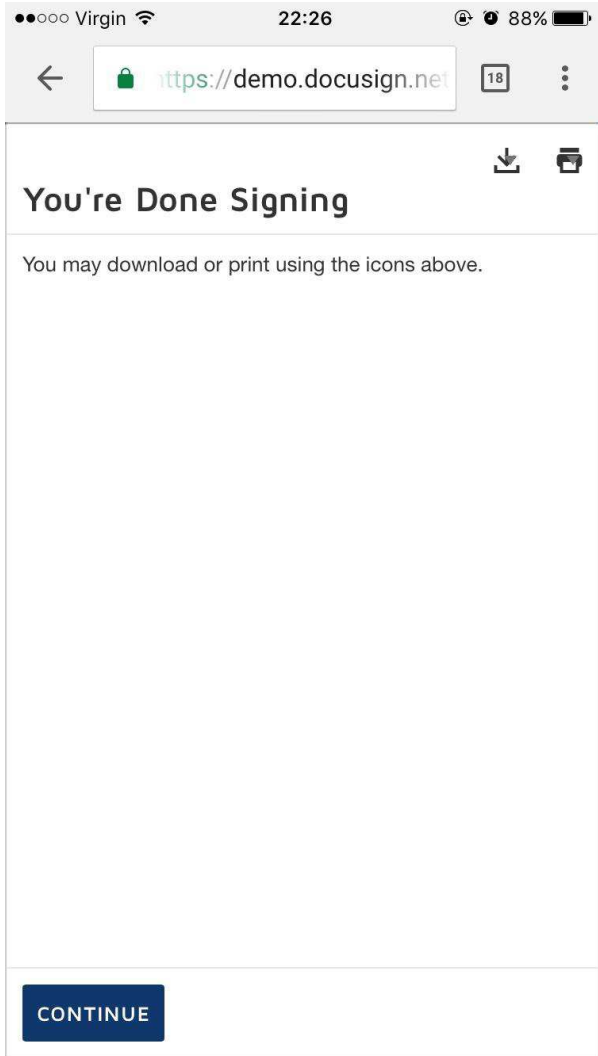
## Step 5: Completing the Review

When you're happy with the document and have added signatures where required, click FINISH. This will only be possible once all signatures are in place and all mandatory fields have been completed.

The screenshot shows a mobile interface for reviewing a document. At the top, the status bar shows 'Virgin' carrier, signal strength, Wi-Fi, time '22:20', and battery '89%'. The browser address bar shows 'https://demo.docusign.net'. The document content includes a blue header with the question 'Have you finished signing?' and a prominent 'FINISH' button. Below this is a 'Part III Certification' section with a list of questions and a 'Sign Here' field with a signature and date. A second page is visible below, titled 'Not Applicable' and 'W-9 Request for Taxpayer Identification Number and Certification'.

Email reminders will be sent if you are yet to complete the process.

After signing and submitting the document, you can access it whenever required to view, download or print. In case you wish to view, download or print your document at a later date, you can re-visit the email sent by DocuSign and review your document. You will need to authenticate once again through your access code and, if applicable, a new OTP (see Step 2 above).



## **Help using DocuSign**

If you need help, your Relationship Manager, CitiPhone Officer or Client Service Manager can guide you through the process of using DocuSign.

To find out more about DocuSign and how it can make banking and investing more convenient, please contact us.



## Minimum Hardware and Software Requirements

<b>Operating Systems:</b>	Windows® 2000 Windows® XP, Windows Vista®; MacOS® X
<b>Browsers:</b>	Final release versions of Internet Explorer® 6.0 or above (Windows only); Mozilla Firefox 2.0 or above (Windows and Mac); Safari™ 3.0 or above (Mac only)
<b>PDF Reader:</b>	Acrobat® or similar software may be required to view and print PDF files
<b>Screen Resolution:</b>	800 x 600 minimum
<b>Enabled Security Settings:</b>	Allow per session cookies
<b>Platforms:</b>	Compatible with desktops, laptops, mobiles and tablets

\*\* These minimum requirements are subject to change. If these requirements change, you may be asked to re-accept the disclosure. Pre-release (e.g. beta) versions of operating systems and browsers are not supported.

DocuSign uses cookies for authentication, security, remembering preferences, analytics and research, and personalized content that helps to deliver, measure, and improve services in various ways.



[www.ipb.citi.com](http://www.ipb.citi.com)

[www.citibank.co.uk](http://www.citibank.co.uk)



#### CitiPhone Banking

IPB - 0808 109 8888 or +44 (0) 20 7500 1445 if calling from outside of UK

CitiGold - 0800 00 56 00 or +44 (0) 20 7500 5600 if calling from outside of UK

All Other Clients - 0800 00 55 00 or +44 (0) 20 7500 5500 if calling from outside of UK



Level 10, Citigroup Centre  
33 Canada Square  
London E14 5LB



P.O. Box 104  
38 Esplanade  
St Helier  
Jersey JE4 8QB  
Channel Islands



Citibank UK Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Our firm's Financial Services Register number 805574. Citibank UK Limited is a company limited by shares registered in England and Wales with registered address at Citigroup Centre, Canada Square, Canary Wharf, London E14 5LB, Companies House Registration No. 11283101. Citibank N.A., Jersey Branch is regulated by the Jersey Financial Services Commission. Citi International Personal Bank is registered in Jersey as a business name of Citibank N.A. The address of Citibank N.A., Jersey Branch is P.O. Box 104, 38 Esplanade, St Helier, Jersey JE4 8QB. Citibank N.A. is a national association governed under the laws of the US, with their principle office at 388 Greenwich Street, New York, NY 10013, [USA.citi.com](http://USA.citi.com). All rights reserved Citibank UK Limited and Citibank N.A. (2024). CITI®, CITI and Arc Design® are registered service marks of Citigroup Inc. Calls may be monitored or recorded for training and service quality purposes.