



## How to Use E-signature

Step 1. You will receive an email from Palm Tree Consulting requesting that you create a pin to electronically sign sensitive documents.

- Click on **Create My Pin**. The link will take you to e-signature Pin Setup. (The link will expire once used or after 48 hours)
- Enter your email address and first and last name. Create a 4-digit Pin, verify Pin and **submit**.
- Message will display that you have successfully created your pin.

Step 2. You will get another email from Palm Tree Consulting requesting that you sign the document.

- Tap on **“Click here”** to sign this document. The link will take you to e-signature and you will **submit** the pin that you created.
- Enter your birthdate and last 4-digits of your social security number and **submit**. The system will launch the document.
- Please read the e-signature agreement and check **“YES”** in the upper left, **“I agree to follow the e-signature agreement,”** then click **continue**.
- Enter your full name and initials then click **“OK”**. Click on **“Sign”** wherever a signature is needed.
- When you have completed the document, click on the **GREEN “Sign Document”** at the lower left-hand corner. A message will show you have successfully signed the document.
- A confirmation email will be sent when all parties have signed.

### Important Notes:

- The signing link will work on a mobile device.
- You do NOT have to be signed up for the portal to complete e-signatures.
- Notification emails with our logo are sent to you when a signing request is sent, if you decline the request, and when the request is complete.
- If there is more than one signer on a document, the first signer will receive an email. After they sign, the second signer will receive an email to sign. The document is not complete until BOTH signers sign.
- The link for signed documents is only valid for 30 days. Please save the signed version of the document for your records.