

# This guide will provide you with the essential steps to eSign your document.

Thank you for choosing to eSign your document!

The eSign application enables electronic delivery of documents so you can sign approved forms without printing, scanning, or faxing.

An eSignature within the eSign application provides the same legal standing as a handwritten signature.

## We are here to help.

- Please reach out to your Financial Advisor for assistance.

## Follow these steps to eSign your Document

### Please review and sign your Wells Fargo document(s)

Please review the document(s) for [Accessibility of Electronic Records](#), [Security](#), [Privacy](#) and sign electronically.

[Sign Now](#)

Note: These documents are easier to read on a larger screen. We recommend viewing them from a computer, rather than a mobile device. Also, make sure you have the latest software or device version for viewing PDF files.

### Step one:

You will receive an email from Wells Fargo Advisors <alerts@notify.wellsfargo.com> indicating there is a document ready for eSign.

Click on **Sign Now** to move to the next step

### Sign On to Wells Fargo Online®

Enter your username and password to manage your accounts and services.

Username  
RUEYUQWU

Password  
\*\*\*\*\*

[Forgot Password/Username?](#) | [Enroll Now](#)

Sign On

### Step two:

A web browser window will open, and you will be asked to **sign on** to your Wells Fargo Online account.

Please read the [Electronic Record and Signature Disclosure](#)

I agree to use electronic records and signatures.

[CONTINUE](#) [OTHER ACTIONS](#)

Relationship Number (Wells Fargo use only): **12345**

This is an addendum ("Addendum") to the Nonprofit/Tax-Exempt Entity Service Agreement (the "Agreement") dated **07/23/2020**, between Wells Fargo Bank, National Association, as Agent ("Wells Fargo") and the below Client.

By completing and executing this Addendum, Client agrees and acknowledges that account(s) requested below ("Additional Account") will be added to Client's existing relationship and governed by the Agreement.

Name of Nonprofit/Tax-Exempt Entity ("Client")		Taxpayer Identification Number (TIN)	
Jo-Ann's Tax Exempt Entity		123-45-6789	
Client's Physical Address	City	State	ZIP
123 Main Street	Concord	CA	95555

**Section I – Additional Account Details**

The below information is required for each Additional Account. If multiple Additional Accounts are needed, complete a separate Form for each. (Institutional planned giving clients may alternatively provide such information using a spreadsheet template obtained from Client's Relationship Manager.)

Additional Account type/purpose:

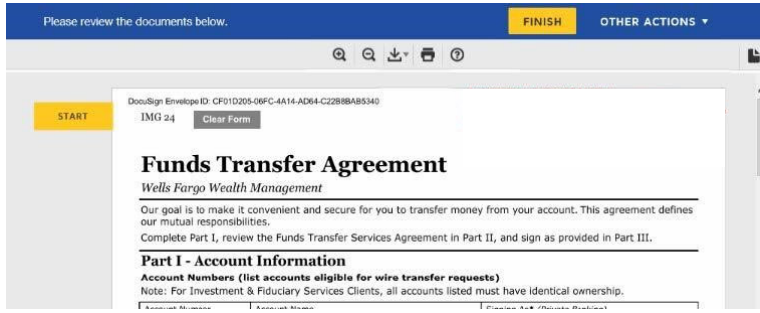
### Step three:

Your document will display for eSign. Please click on the checkbox to agree to the "Electronic Record and Signature Disclosure."

Select **Continue**.

### Investment and Insurance Products are:

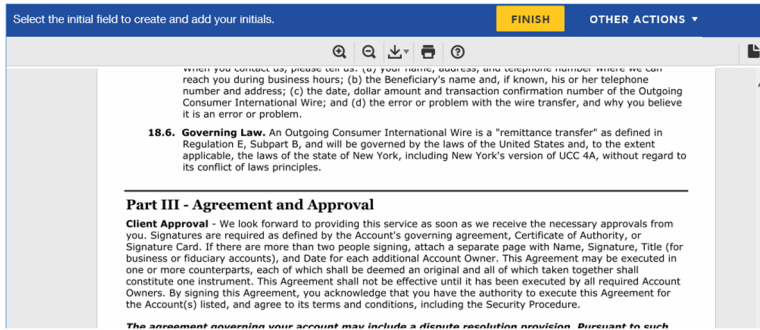
- Not Insured by the FDIC or Any Federal Government Agency
- Not a Deposit or Other Obligation of, or Guaranteed by, the Bank or Any Bank Affiliate
- Subject to Investment Risks, Including Possible Loss of the Principal Amount Invested



### Step four:

Now you are ready to electronically review and sign your document.

Select **Start** to begin and follow the onscreen prompts to sign your document.



### Step five:

The eSign application will identify the locations for you to initial and sign your document.

Select **NEXT** if there are multiple initial or signature locations.

Select **FINISH** to complete signing the document.

### Thank you for visiting.

Thank you for using Wells Fargo Online®. Your session has ended. In order to access your account information, you will need to [sign on](#) again.

### Step six:

“Thank you for visiting” screen will be displayed to confirm the completion of your signing.

An email will be sent to you with a link to download and save the completed document. If the document is a multi-party document, the email will be delivered once all parties completed their signature.