

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 TEST WHITELIST and sign electronically.

[Sign Now](#) and authenticate using the following Access Code **3VVVK 8D2GF**

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. This email contains an access code needed for authentication, please take note of the access code for use in the next step.

Click on Sign Now to move to the next step

Go to your documents

Enter your information to access and sign your documents.

Email address

Access code

[Resend the access code](#)

Continue

Step two:

A web browser window will open, and you will be asked to provide the same email address and access code from the email.

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

Tell Us About Yourself

Last 4 digits of your SSN or ITIN

Last name

Date of birth

MM/DD/YYYY

Cancel

Continue

Step three:

You will be prompted to enter the last four digits of your SSN or ITIN, your last name, and date of birth. This is to verify your identity.

If you received an error, please contact your FA.

Select Continue.

Select Your Phone Number

Select a number for receiving your code.

Work ***-***-2316



Home ***-***-2316



Try Another Method

Step four:

Select a phone number to receive a text message with an access code.

Note this screen may not appear if you have one trusted phone number.

Message Delivery Agreement

Your code will be sent to ***-***-2316 or you can [Choose Another Number](#).

By selecting **Get Code**, you agree Wells Fargo may deliver a one-time verification code to you using the delivery method above.

Your mobile carrier's message and data rates may apply.

Get Code

Try Another Method

Step five:

A confirmation will display with the trusted phone number to receive the access code.

Select Get Code.

If Get Code does not appear, please contact your Financial Advisor to use an alternative method to sign your document.

Enter Code

receive it.

Access code

You may not receive your code immediately. Please allow a few minutes for delivery.

If you didn't receive your code, please verify:

- Your phone is on, has coverage based on your current location, and is ready to receive messages.
- You've verified that your contact information is correct.

If you didn't receive your code or if the code you received has expired, you can [request a new code](#).

Try Another Method

Submit

Step six:

You will receive an SMS message with an access code, type the access code onto the box.

Select Submit.

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	55555

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 seven:

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

Select Continue.

Please review the documents below.

FINISH OTHER ACTIONS ▾

DocuSign Envelope ID: CF01D205-06FC-4A14-AD64-C228B8A85340

START Clear Form

Funds Transfer Agreement
Wells Fargo Wealth Management

Our goal is to make it convenient and secure for you to transfer money from your account. This agreement defines our mutual responsibilities.

Complete Part I, review the Funds Transfer Services Agreement in Part II, and sign as provided in Part III.

Part I - Account Information

Account Numbers (list accounts eligible for wire transfer requests)
Note: For Investment & Fiduciary Services Clients, all accounts listed must have identical ownership.

Step eight:

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

Select Start to begin.

Select the initial field to create and add your initials.

FINISH OTHER ACTIONS ▾

18.6. **Governing Law.** An Outgoing Consumer International Wire is a "remittance transfer" as defined in Regulation E, Subpart B, and will be governed by the laws of the United States and, to the extent applicable, the laws of the state of New York, including New York's version of UCC 4A, without regard to its conflict of laws principles.

Part III - Agreement and Approval

Client Approval - We look forward to providing this service as soon as we receive the necessary approvals from you. Signatures are required as defined by the Account's governing agreement, Certificate of Authority, or Signature Card. If there are more than two people signing, attach a separate page with Name, Signature, Title (for business or fiduciary accounts), and Date for each additional Account Owner. This Agreement may be executed in one or more counterparts, each of which shall be deemed an original and all of which taken together shall constitute one instrument. This Agreement shall not be effective until it has been executed by all required Account Owners. By signing this Agreement, you acknowledge that you have the authority to execute this Agreement for the Account(s) listed, and agree to its terms and conditions, including the Security Procedure.

The agreement governing your account may include a dispute resolution provision. Pursuant to such

Step nine:

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.

* Disclosures

Investment products are - Not FDIC insured - Not guaranteed by the Bank - May lose value.
Deposit products offered by Wells Fargo Bank, N.A. Member FDIC.

Equal Housing Lender

© 1999 - 2020 Wells Fargo. All rights reserved. NMLS ID 399801

Step ten:

"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.

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, Member SIPC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company.

© 2025 Wells Fargo Clearing Services, LLC. PM-10212026-7879858.1.1