



**INTEGRITAS**  
WEALTH PARTNERS

# A Guide to Digitally Signing Documents

Partners in Managing Your Wealth



Integritas Wealth Partners, 28 Halkett Place, St Helier, Jersey, JE2 4WG.

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Incorporated in Jersey, Company No. 123205

## Signing a document for Integritas Wealth Partners

If you have been sent an email with a form which requires signature this guide will help you sign the form digitally, without the need to print and post or scan a return copy.

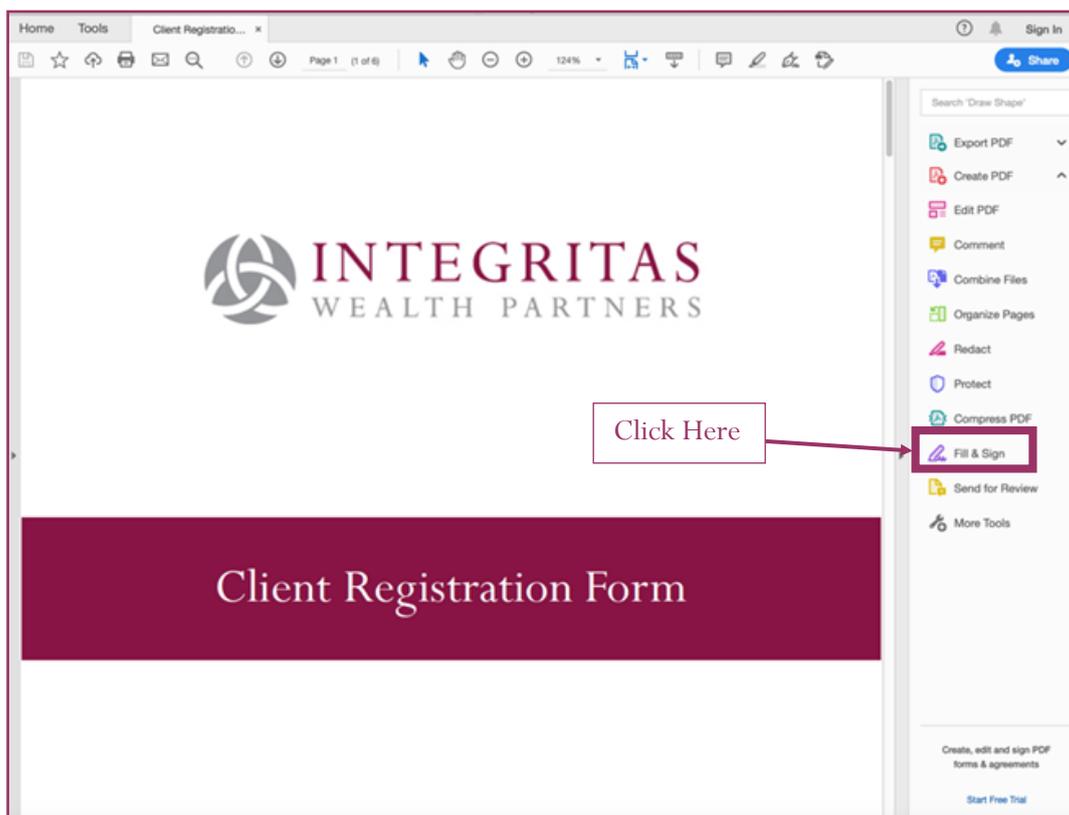
If you have not received an expected message it may be worth checking your “junk” mail folder, in case this may have been diverted by your e-mail firewall.

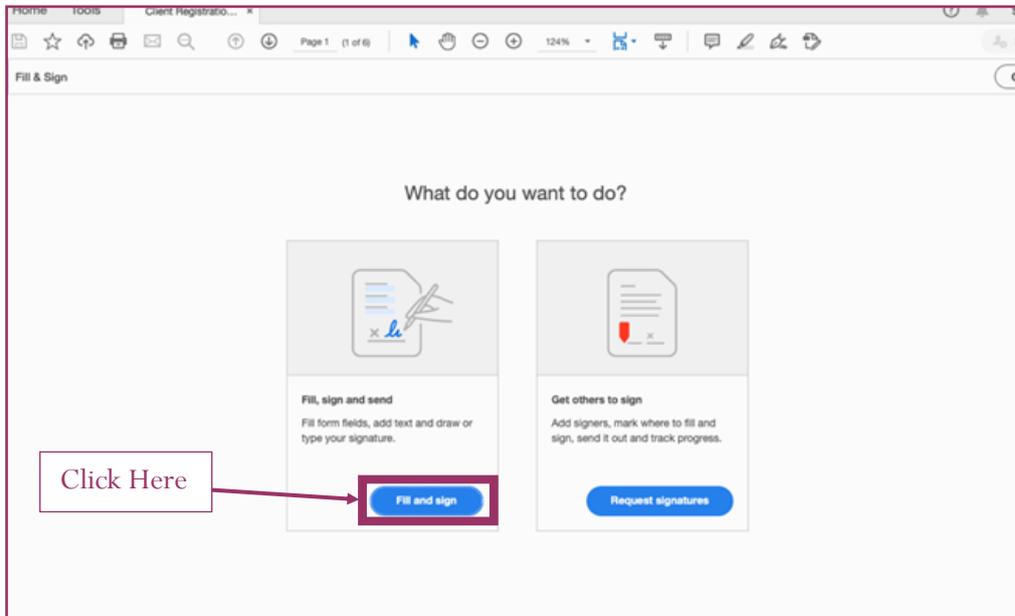
Forms for signature from Integritas Wealth Partners will be sent in .pdf format. We recommend using Adobe Acrobat reader to open .pdf files, but other programmes are available. This guide will assume Adobe is used. Adobe Acrobat reader is freely available to download from the following link:

<https://acrobat.adobe.com/us/en/acrobat/pdf-reader.html>

Once opened, the document may need further completion and will also need your signature.

In the first instance, click “Fill and Sign”.





## To complete text

Click the “ab” symbol and insert the text box where you would like the text to be added. You may be required to add personal details that are missing or checking and correcting prepopulated details where necessary.

A screenshot of a web browser window showing a 'Fill & Sign' interface. The page title is 'Client Registratio...'. The main heading is 'PLEASE COMPLETE IN BLOCK CAPITALS AND BLACK INK AND TICK OR COMPLETE ANSWERS AS APPROPRIATE'. The form is titled 'Your details'. The form contains the following fields:

- Title: Mr , Mrs , Miss , Ms , Other
- Surname: Example
- Forename(s): John
- Address: 1 The Street, Anytown, Country
- Postal code: AB1 1BA
- Date moved to current property: 0 | 1 | 0 | 2 | 2 | 0 | 0 | 0 (DAY MONTH YEAR)
- Date of Birth: 1 | 0 | 0 | 1 | 1 | 9 | 7 | 5 (DAY MONTH YEAR)
- Tax Identification Number: J | Y | 1 | 2 | 3 | 4 | 5 | 6 | A
- Telephone Numbers: Home Number 01534 123456, Work Number 01534 654321, Mobile Number 07797 123456
- Email Address: johnexample@gmail.com
- Business Email Address: johnexample@mybusiness.com

A red box highlights the 'ab' symbol in the toolbar, with a red arrow pointing to it from a white box with the text 'Select "ab" for text'. The toolbar also includes a 'Next' button and a 'Close' button.

It is then possible to move the cursor to the relevant section and you can type to enter the required information.

A screenshot of a web form titled "Your details". The form contains several input fields: Title (Mr checked, Mrs, Miss, Ms unchecked), Surname (Example), Forename(s) (John), Address (1 The Street, County), Date moved to current property (01/02/2000), Date of Birth (10/01/1975), Telephone Numbers (Home: 01534 123456, Mobile: 07797 123456), and Tax Identification Number. A red oval highlights the "County" input field.

### Adding your digital signature

By clicking "Sign" you will be able to add your digital signature to the form.

A screenshot of the "Your details" form, now showing additional fields: Postal code (AB1 1BA), Tax Identification Number (JY 1 2 3 4 5 6 A), and Business Email Address (johnexample@mybusiness.com). A red box highlights the "Sign" button in the top right corner of the form area. A red arrow points from a box labeled "Sign button" to this button.

You will then be given the option to "Add signature" or "Add initials".

Please **always** select "Add signature"

A close-up screenshot of the form's title bar area. A dropdown menu is open, showing two options: "Add Signature" and "Add Initials", both with a plus sign icon. A red oval highlights the "Add Signature" option.

The signature window will then be displayed. You can type, draw or upload a pre-saved image.

Once signed, click “Apply”.

When you click “Apply” your mouse pointer will act like a pen making your signature – simply click into the signature box and it will land there.

If you prefer to have an actual signature and have not already saved one, this can be done by taking a photo of your signature and saving it to an images file and then selecting it to be used as your digital signature within the “Sign” button.

### Adding a date to the document

Click the “ab” symbol and insert the text box where you would like the date to be displayed.

Save the document to your desktop and e-mail back as an attachment.

Thank you for taking the time to read this guide. If you have any problems signing a form please do not hesitate to contact your Wealth Partner for assistance.



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