

# ALITIS

INVESTMENT COUNSEL



**ELECTRONIC SIGNATURES**

# Electronic Signatures at Alitis

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Alitis is excited to announce that we can now accept electronic signatures on most Alitis account forms using the DocuSign platform. While we love to meet our clients in person, the social distancing measures in place for the foreseeable future mean that most of our client meetings will occur by phone or video conference. Offering electronic signatures will allow us to continue to open new accounts and make changes to your existing accounts, if necessary. We have created an FAQ section below to provide further information and details.

## What is an electronic signature?

Electronic signatures allow you to legally sign documents and replace paper-based handwritten “wet” signatures.

## Are electronic signatures legally binding?

Yes, electronic signatures are valid and legally binding in Canada.

## What are the benefits of electronic signatures?

Electronic signatures allow clients to quickly and easily sign Alitis forms at anytime, from anywhere in the world. Electronic signatures also reduce the use of paper and envelopes making it an environmentally friendly way to process documents.

## What is DocuSign?

DocuSign is an American company headquartered in San Francisco that provides a secure method of sending client documents to obtain electronic signatures. DocuSign was founded in 2003 and is one of the leading e-signature providers in North America. DocuSign is widely used in the real estate industry so if you have bought property in the last five years you may be familiar with the platform.

## How will Alitis use DocuSign?

Alitis plans to use DocuSign in order to facilitate the collection of client signatures required on Alitis forms. The documents will be delivered via email, electronically signed by clients, and automatically returned to the Alitis team for processing.

## Will all Alitis forms be signed with DocuSign?

Most Alitis forms that require client signatures can be signed with DocuSign, however there are a few exceptions. For example, forms that designate an account beneficiary or make changes to a beneficiary will still require a wet signature.

### Will all clients need to use DocuSign?

DocuSign will be optional for all clients. While we expect most clients will enjoy the quick and efficient collection of signatures that DocuSign provides, we will be more than happy to collect paper-based signatures upon request.

### Are electronic signatures secure?

Electronic documents signed using the DocuSign platform are encrypted and tamper evident. A Certificate of Completion is provided for all documents which provides an audit trail of the process including who signed and when. More information about the security of DocuSign can be found here: <https://www.docusign.com/trust/security>

### Will I need to create a DocuSign account?

There is no requirement to create a DocuSign account in order to sign Alitis documents. You may be given the option to create an account, however it is not required.

### What if I need assistance signing the document electronically?

The Alitis Team will always be available to assist with electronic signatures. Please don't hesitate to contact us at 1-800-667-2554 for assistance.