

# Morgan Stanley

## eSign

### What You Need To Know

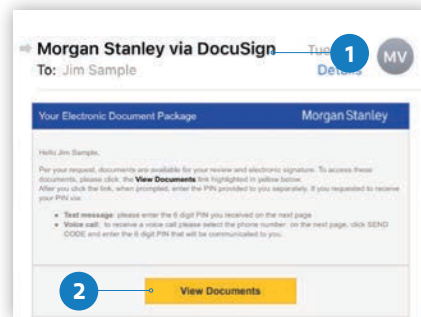


To use eSign, all you need is a valid email address, a phone number and/or at least one Morgan Stanley Online (MSO) User ID. Please follow the steps below to complete the signing process based on the delivery channel selected by branch personnel.

### PIN Delivery

#### STEP 1: ACCESS EMAIL

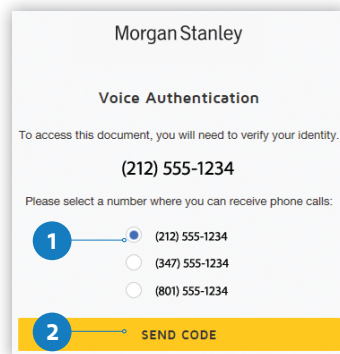
1. Access the email titled “Your Electronic Document Package,” from “Morgan Stanley via DocuSign.”
2. Click the “View Documents” button in the email. A new browser window will open.



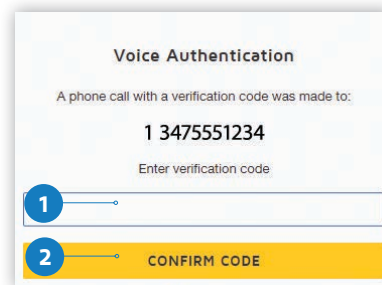
*NOTE: This email will not come from a Morgan Stanley email address; it will come from `dse_na2@docuSign.net` and display as “Morgan Stanley via DocuSign” in your inbox.*

#### Option A: Via phone call

Selecting “View Documents” in the email will launch a new screen where you can choose the number that will receive the PIN.



1. Select the phone number where you will receive the PIN
2. Click “SEND CODE”

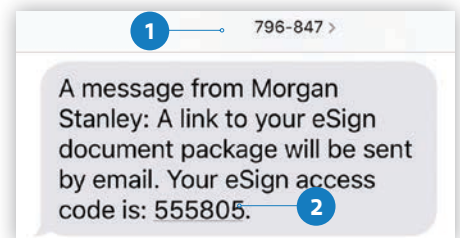


1. Once the PIN is communicated, enter the PIN
2. Click “Confirm Code”

*If you do not recognize any of the numbers, do not proceed. Contact your Financial Advisor or Private Wealth Advisor.*

#### Option B: Via text

The PIN will be the six-digit number located within the content of the text message (not the six-digit number from which the text was sent). Option B continues on the reverse side. ▶

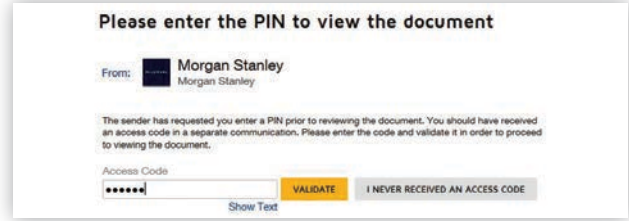


1. Sender's number
2. PIN for eSign

**Option B: Via text continued**

Enter the PIN that was sent to your mobile phone number and click "Validate."

*The PIN expires 60 days after the package is sent. If you did not receive or no longer have a PIN, please contact your Financial Advisor or Private Wealth Advisor.*



**STEP 2: REVIEW AND AGREE TO TERMS**

Click the check box agreeing to use electronic records and signatures, then click "Continue" to proceed.



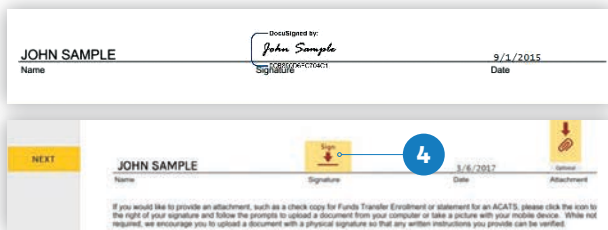
**STEP 3: NAVIGATING/REVIEWING FORMS**

Please be sure to review all forms and agreements in their entirety before providing your electronic signature. You may scroll through the forms or use the "Start/Next" prompts to navigate the document. The prompts will direct you to each field that requires you to enter information or provide a signature. You can also make edits to most information already populated within the form.



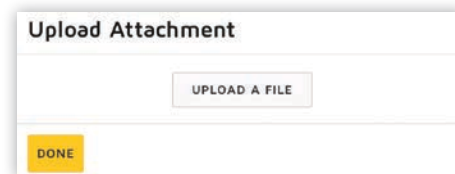
**STEP 4: PROVIDING A SIGNATURE**

To complete the process, you must provide your signature where directed. When signing for the first time, you will be asked to select an electronic signature style. If you are on a mobile device, you may sign with your finger or stylus. The selected signature will be applied to all signature fields. The date fields will automatically populate when the form is signed.



**Optional: Uploading attachments**

You have the option to upload additional documents that may be needed to complete the process. The attachment icon will appear next to the last signature field. If you have a copy of what you would like to provide (PDFs of statements, photo of a driver's license, image of a voided check, etc.) available on your computer, click on the attachment icon then click "Upload a File." You may upload multiple documents or click "Done" to return to the form.

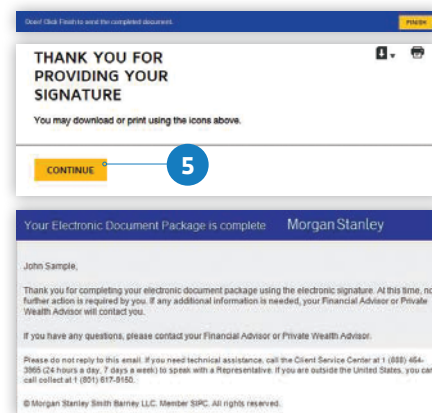


**STEP 5: COMPLETE AND SUBMIT**

Once all required data has been provided and all signatures applied, click "FINISH" at the top of the screen. This will complete the signing process and return the forms to Morgan Stanley.

Clicking "CONTINUE" will redirect you to Morgan Stanley Online, where you are able to log in and view your account, if enrolled. We encourage you to register for Morgan Stanley Online and enroll in eDelivery if you have not done so already.

Upon submitting the document(s), you will receive a thank you email from DocuSign with the subject "Completed: Your Electronic Document Package."

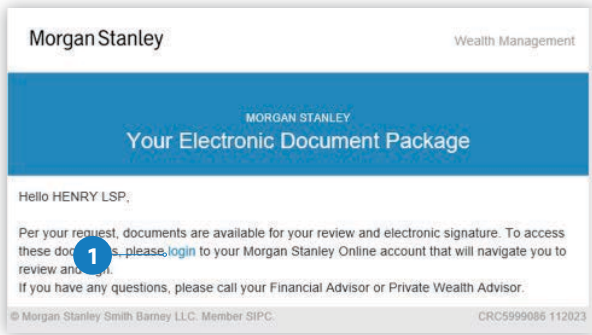


# Morgan Stanley Online

You are eligible to receive and sign eSign packages on Morgan Stanley Online if you are enrolled in MSO.

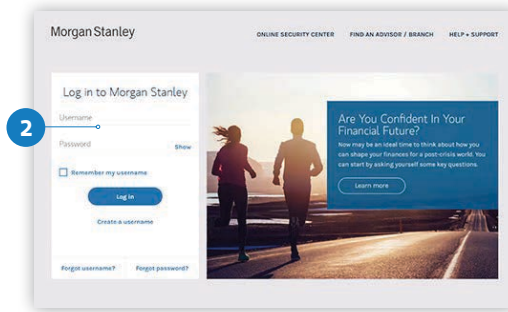
## STEP 1:

Based on your MSO alert preferences, you can receive the email below. In the email, click “login”.



## STEP 2:

Once you click “login”, you will be redirected to the Morgan Stanley Online (MSO) portal. You can log in using your MSO account credentials. Note: If you do not opt into email alerts, you will still be able to access the eSign document upon login to MSO.

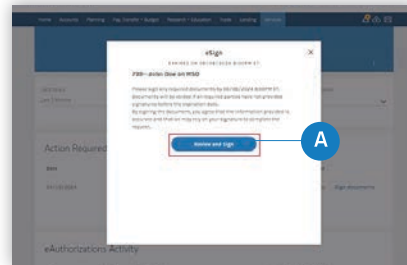


## STEP 3:

Once you successfully log into MSO, there are three options to access the document(s) to review and sign.

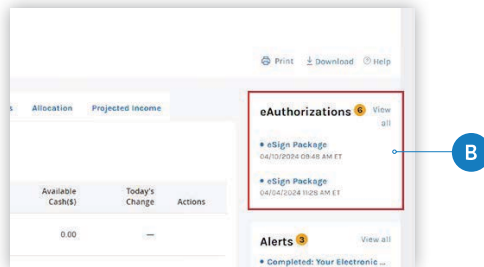
### Option A:

Upon login, an eSign pop-up will display for the document(s) pending signature. Click the “Review and Sign button”.



### Option B:

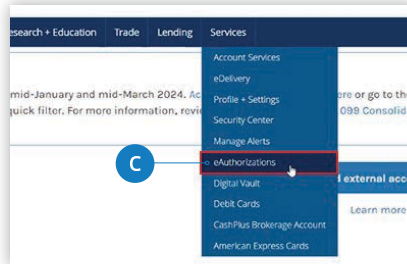
The eSign packages will appear in the eAuthorizations section in the lower right-hand corner of the MSO home page. On the Notifications pop-up, you can select the document(s) in the eAuthorizations tab and click the “Review and Sign” button.



### Option C:

Navigate to the eAuthorizations menu by clicking Services > eAuthorizations.

Documents to be signed will be displayed in the right column. Select “Sign Documents” for the eSign package(s).



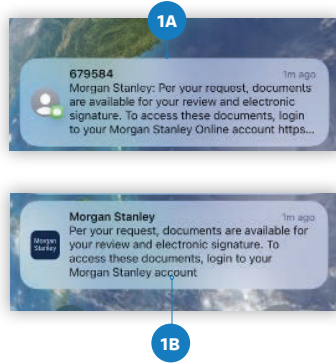
# Morgan Stanley Mobile

You are eligible to receive and sign eSign packages on Morgan Stanley Mobile if you are enrolled in MSO.

### STEP 1:

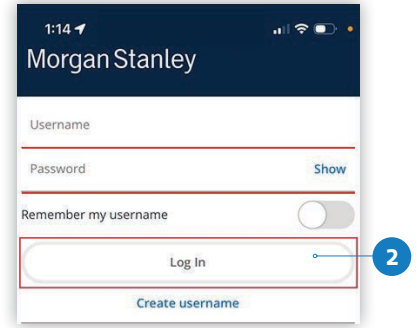
Based on MSO alert preferences, you can receive one of the alerts below on your mobile device:

- 1A. Text message notification
- 1B. Push notification



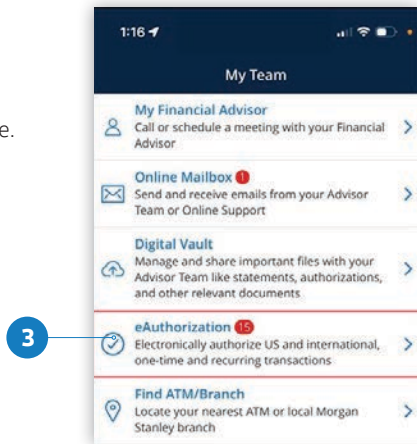
### STEP 2:

On the Morgan Stanley Mobile app (MSM), log in using your Morgan Stanley Online (MSO) account credentials. Then, click the “Log In” button to continue. Note: If you do not opt into text/push alerts, you will still be able to access the eSign document upon login to MSM.



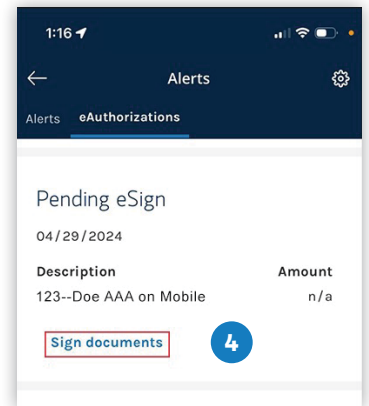
### STEP 3:

Next, click on the “eAuthorization” button to continue.



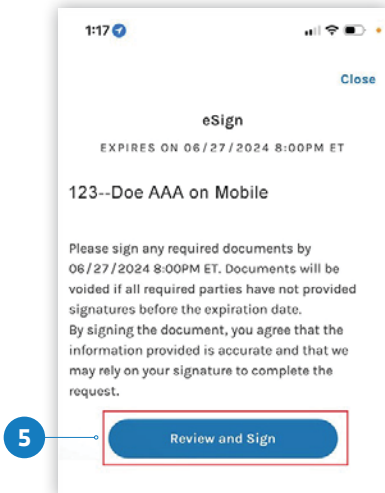
### STEP 4:

The eAuthorizations screen appears with a list of packages to be signed. Click the “Sign Documents” button to continue.



### STEP 5:

Click the “Review and Sign” button to continue.



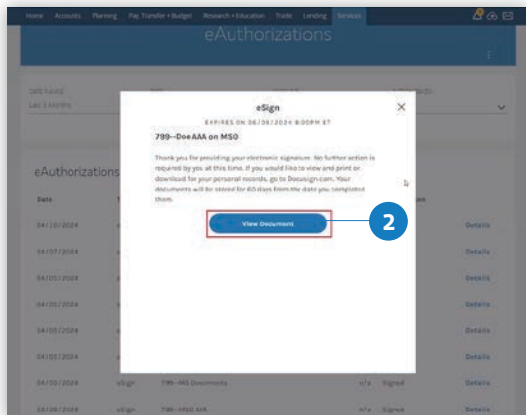
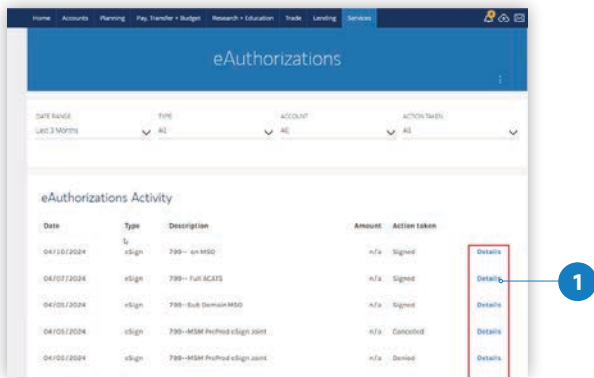
### STEP 6: VIEW COMPLETED FORMS

You have 60 days to view the signed and returned document(s).

If you are enrolled in MSO, you can view completed forms by logging into Morgan Stanley Online/Mobile using your MSO login credentials.

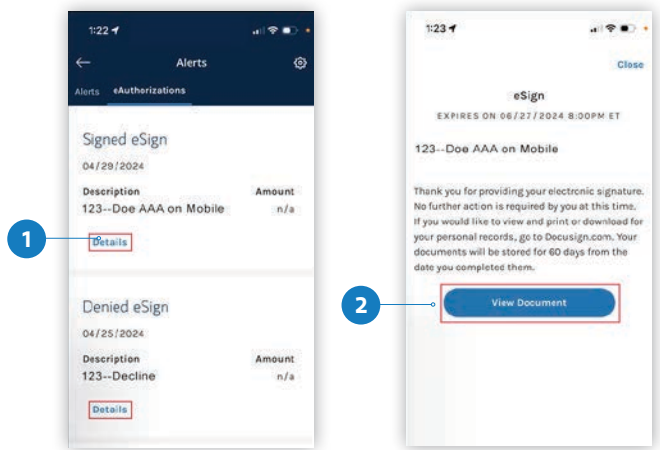
#### Morgan Stanley Online

1. Navigate to the eAuthorizations screen by clicking Services > Authorizations. Select the document(s) by clicking on “Details”.
2. Click the “View Document” button to open the document.



#### Morgan Stanley Mobile

1. Navigate to the Authorizations screen and select the document(s) by clicking on “Details”.
2. Click on the “View Document” button to open the document.



*NOTE: After 60 days, the “View Document” button will not be available on MSO/MSM.*



## For Help

If you have any questions or need help, please contact your Financial Advisor or Private Wealth Advisor.