Morgan Stanley

eSign

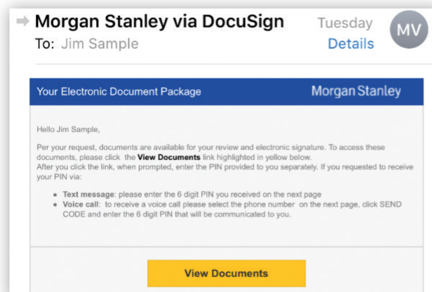
What You Need to Know

To use eSign, all you need is a valid email address and phone number. The personal identification number (PIN) can be delivered via phone call or via text message. Once you receive an email from "Morgan Stanley via DocuSign," follow the steps below to complete the signing process.

1 Access Email

- Access the email titled "Your Electronic Document Package," from "Morgan Stanley via DocuSign."
- 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.

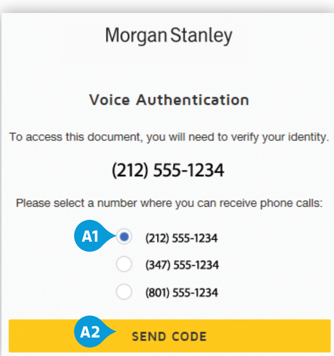


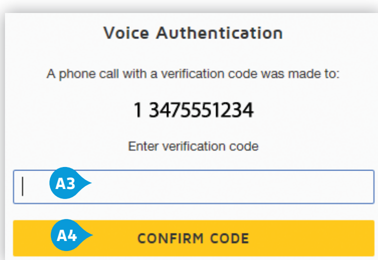
2 Enter PIN

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.

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





A1 *Select the phone number where you will receive the PIN*

A2 *Click "SEND CODE"*

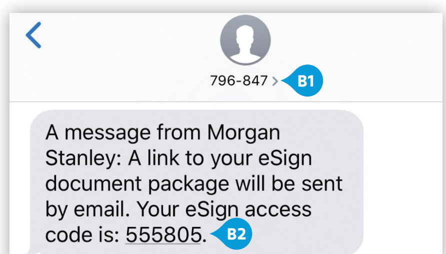
A3 *Once the PIN is communicated, enter the PIN*

A4 *Click "CONFIRM CODE"*

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. ▶



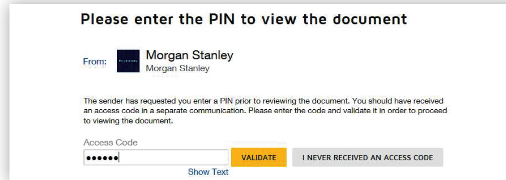
B1 *Sender's number*

B2 *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.

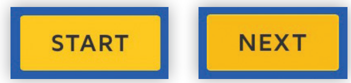


3 Review and Agree to Terms

Click the check box agreeing to use electronic records and signatures, and then click “CONTINUE” to proceed.

4 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.

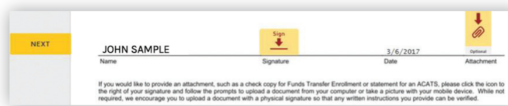


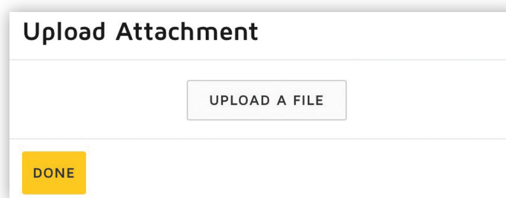
5 Providing a Signature

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 and then click “UPLOAD A FILE.” You may upload multiple documents or click “DONE” to return back to the form.



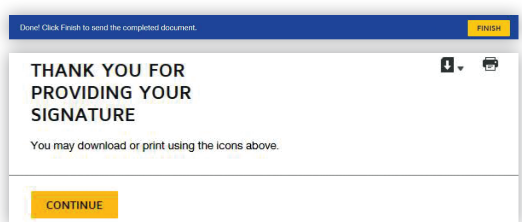


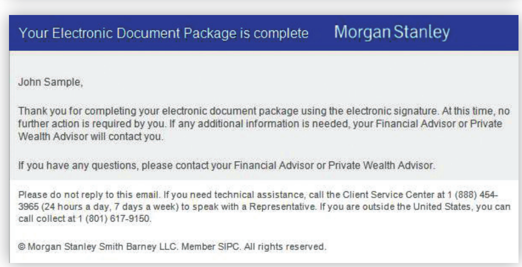
6 Complete and Submit

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.”





FOR HELP

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