

Get Contracts Quickly With DocuSign

With DocuSign, your clients get fast delivery of contracts that they can easily review and sign. And you get the assurance that your client has reviewed and signed all required documents in a timely manner.

To get started, include both the producer's and the client's email address on each annuity application. If one isn't provided, we'll reach out to request it. If we don't receive the client's email address, we are unable to deliver a copy of the contract to the producer through DocuSign.

We'll e-deliver the contract to the client and a copy to the producer.* If you or your client need to sign a contract amendment, we'll also deliver that through DocuSign to avoid delays.

DocuSign is the quickest way to deliver contracts. Mailing paperwork through the U.S. Postal Service is still an option, but keep in mind that delays caused by the pandemic mean it can take 7 to 10 business days for a contract to arrive by mail.

How DocuSign Works:

- 1. Review the DocuSign email.** Once the policy has issued, you and your client will receive an email from The Standard.
 - *Open the email and review the message. Select the button in the email to begin the process.*
- 2. Enter your access code.** Use the last four digits of your Social Security number, followed by the five-digit ZIP code of the mailing address that we have on file for you.
 - *Each person has a unique access code to ensure privacy.*
 - *If the contract is for a minor, the custodian should use the minor's information for the access code.*
- 3. Review the electronic transaction disclosure.** Review the disclosure. If you want to use electronic transactions, select "I agree to use electronic records and signatures."
- 4. Review the contract and sign, if required.**
 - *If signatures are required, DocuSign will show you and your clients where to sign. After all signatures are complete, each party will receive a final copy. You will be notified by email when this happens.*
 - *If signatures are not required, you can view, save and print contracts through DocuSign.*

Timeline for Online Delivery:

Day 1: We'll send the first email within four hours after the contract issues.

Day 5: We'll email a reminder to review and sign (if required) the contract.

Days 9-13: We'll email recipients daily to remind them to review and sign (if required) the contract.

Day 14: The link to review and sign the contract will expire.

We'll send an email when the review and signature steps are complete.

30-Day Right to Cancel:

- *CA, SD, LA, PA and WV require a delivery receipt. The 30-day right to cancel begins the date on which the delivery receipt is signed.*
- *For all other states, the 30-day right to cancel begins on the day the client enters the unique access code and accesses the electronic contract.*

Frequently Asked Questions

Is the contract sent to both the client and the producer?

Yes, if both email addresses are included on the application.* If we don't receive the client's email address, we are unable to deliver a copy of the contract to the producer through DocuSign.

What if the client doesn't want to provide an email address?

We'll print and mail the contract to the client, unless special handling requirements have been received from your broker dealer to deliver the contract directly to the producer. We mail through USPS, with delivery in 7-10 business days.

The producer will not receive a copy of the contract through DocuSign, but will receive a contract summary when contracts are delivered to the client directly.

What if a client declines to use DocuSign?

The client can provide a reason and select Decline to Sign. We'll print and mail the contract through USPS, with delivery in 7-10 business days.

How soon after the contract is issued will The Standard deliver the contract through DocuSign?

Contracts are sent to DocuSign immediately after issue. It takes between one minute and four hours for the DocuSign email to be sent. For more details, review the timeline for online delivery section.

What email address does the DocuSign email come from?

The email comes from the DocuSign application email: dse_na2@docusign.com. The subject line shows the annuity contract number and the applicant's name.

If no signatures or policy exceptions are required, why does the client need to open the email?

We need to verify that the contract has been viewed for our compliance records. Some states require a delivery receipt. The client and producer should also review to ensure all contract information is correct.

How do I print the contract?

Select the download option to save it to your computer. Then select the print option to print your contract.

What is my unique access code?

Your access code is the last four digits of your Social Security number, followed by the five-digit ZIP code of the mailing address we have on record. This is also stated in the emails sent through DocuSign.

What if my access code fails?

The Standard will receive the error message "Authentication Failed."

- We will verify the email, the last four digits of your Social Security number and the ZIP code we have on file for you, then resend the contract through DocuSign.
- If the information provided to us is not correct, we'll reach out to the producer for correct information or mail the contract.

DocuSign Support

Contact our Service Specialists at [800.247.6888](tel:800.247.6888) or annuityservices@standard.com.

* Check with your distributor if you will receive a copy of the contract. If the client's email address isn't provided, we are unable to deliver a copy of the contract to the producer through DocuSign.

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The Standard is a marketing name for StanCorp Financial Group, Inc. and subsidiaries. Insurance products are offered by Standard Insurance Company of Portland, Oregon in all states except New York. Product features and availability vary by state and are solely the responsibility of Standard Insurance Company.

Annuities are not (a) insured by the FDIC or any federal government agency, (b) deposits of or guaranteed by any bank or credit union and (c) a provision or condition of any bank or credit union activity. Some annuities are subject to investment risk and may lose value. A surrender charge may apply during the surrender period, and a 10% penalty may apply to withdrawals prior to age 59½.

For producers only. Not for use with consumers.