

# Electronic Signing

Utilising eSigning for documents enables faster, easier, more convenient and secure processes. We have utilised DocuSign software for eSigning within our business since 2015 to enhance security around key documents and speed up the communication process for annual financial statement packages and ASIC annual reviews.

This Fact Sheet will explain the process of eSigning, the legality of it, how the security works and the overall benefits of using this method of signing for your SMSF.

## What is electronic signing? And how does it work?

eSigning is any method which applies a “signature” to an electronic message. This can range from the typed name of the sender to an image of the handwritten signature of the sender being applied.

We utilise DocuSign to prepare, execute and manage document signing in an all-digital environment. The process works as follows:

- 1** SuperGuardian prepares documents for signing in DocuSign which goes through a series of internal reviews before being sent by the Client Manager to the clients.
- 2** Clients receive a courtesy email from their SuperGuardian Client Manager to inform that documents are being sent via DocuSign for signing.
- 3** Clients receive email from DocuSign with a link to the documents. The sender's name will display in your inbox as 'Electronic Document via DocuSign' from email address (dse@aumail.docusign.net)
- 4** Clients can click the 'Review Document' button, at which point they will be asked to enter a unique code, sent to their mobile, in order to access, review and save the documents.
- 5** Clients can sign the documents by clicking on the 'start' button to jump to the required fields for signing. Once all required fields are completed, click the "Finish" button.
- 6** Once all the signatories have completed signing, the Clients and SuperGuardian will receive an email notification with a link to the signed documents which they can download. SMS authentication will be required to access the documents.

Once we have the electronically signed copies of the documents, we can take the necessary action such as lodging with the ATO or ASIC depending on the forms involved.

## Is electronic signing legal in Australia?

Electronic signing has been legal in Australia since 1999. Australia's Electronic Transactions Act (1999) defines a regulatory framework for electronic transactions and states: “Documents signed online with legally compliant e-signature software are as valid and binding as traditional pen-and-paper documents”.

Electronic signing is an acceptable use of sign off where:

- A method is used to identify the person and to indicate the person's approval of the contents;
- The method used is reliable and is appropriate for the purposes of the communication;
- The person who requires the signature has consented to the use of the method

## How can we verify who is signing a document?

We will utilise your personal email address to send documents to you for signing. Once executed, DocuSign provides us with a court admissible, digitally signed and tamper sealed Certificate of Completion which contains a comprehensive digital audit trail including:

- Signer names
- Authentication history
- Digital signatures
- Email addresses
- Signer IP addresses
- Chain of custody (i.e., sent, viewed, signed, etc.)
- Trusted timestamps
- Geolocation capture of signer (if provided)
- Completion status

## What are the benefits of electronic signing?

Electronic signing is our preferred method of signing and we believe it benefits our clients for the following reasons:

### Availability

You can sign your documents anywhere on just about any electronic device and it is legally binding.

### Safer

Eliminates risks involved with posting hard copy documents to you - such as mail being delivered to an old or incorrect address, or mail being lost in transit.

### Speed & Convenience

Documents are emailed for instant delivery, signature and return so there is no waiting for physical delivery of mail. This makes it quicker and easier to execute documents.

### Eco-Friendly

You can download or save electronic copies of documents rather than holding onto paper copies.

### Security

It is more secure than using paper and posting physical documents. Documents are encrypted and a digital audit trail is maintained.

## Any Questions?

If you have any further questions, or wish to discuss the process in more detail, please contact your Client Manager on **1300 787 576**.

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