

Deliver Faster Client Servicing with DocuSign Notary

Notarizations occur in every corner of private wealth management, from setting up trusts to changing beneficiary designations. With high value assets and client trust at stake, notarizations are essential to safeguard the authenticity and integrity of key documents, but the process is often tedious and time-consuming. Close to 70% of notarizations in the financial services sector have historically been completed on paper and in-person.¹ This causes delays in servicing, increases the risk of noncompliance and results in a poor experience for both clients and advisors. It's time for a better, modern approach. With **DocuSign Notary**, financial advisors can securely conduct remote online notarization transactions for critical documents, leveraging DocuSign's trusted eSignature platform.

Delight clients with convenience

A new generation of investors is rising and 57% of them have indicated that they are willing to switch advisors if they don't use technology to enhance their services.² Advisors can meet these higher standards by offering a more convenient notarization experience. Clients can navigate agreements with a notary public over secure two-way audio-visual sessions, eliminating the logistic hassle of meeting in-person. When managing agreements with multiple signers, like beneficiary designations, Notary can accommodate up to four signers in a single virtual session.

Mitigate risk and reduce fraud

Financial fraud is rampant today and high-net-worth clients are particularly attractive targets. To protect clients from identity fraud and comply with state-by-state remote online notarial requirements, secure identification of parties is an important first step. With Notary, wealth managers can have higher confidence in their identification processes, using both knowledge-based authentication and identity verification via government-issued IDs to ensure transactions are legitimate.

Finalize financial planning documents faster

Advisors want to maximize their time serving clients, but 59% of them believe that paperwork cuts into valuable client-facing time.² Notarization slows down the financial planning process because of the many steps and parties involved. By digitizing the process and integrating with existing systems, advisors can cut down preparation time, ensure proper document execution, and reduce "not in good order" (NIGO) risk with easy Notary-specific drag-and-drop fields. Moreover, advisors can conduct the entire transaction without leaving the platform trusted by the industry's leading custodians.

Ensure compliance

Wealth managers are under constant pressure to ensure their processes are audit-ready and comply with SEC and state regulations, so clear and complete documentation of notarized forms is necessary. Notary provides a detailed audit trail for every notarial transaction, including Certificates of Completion for the advisors and secure audio-visual recordings and electronic journals for the notaries public.

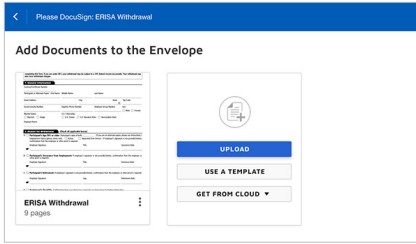
Common use cases

- Beneficiary changes
- Retirement distributions
- Estate planning
- Death certification

Common forms or notarial acts

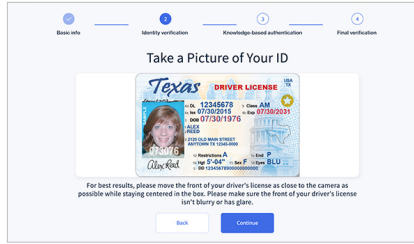
- Beneficiary designation form
- 401K/IRA distribution & rollover
- Trust certificate
- Power of attorney
- Signature witnessing
- Affidavits

How it works



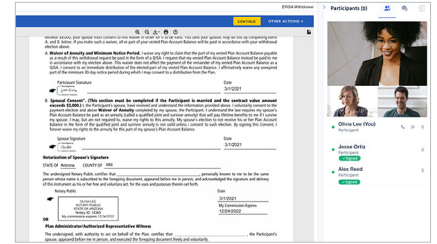
Send an agreement

Easily upload an agreement or use a template. Add signers and the notary public, then quickly drag and drop fields onto the document.



Verify signers' identities

Securely authenticate your signers' identities with identity verification and knowledge-based authentication—before they can access the agreement.



Sign and notarize

Remotely sign and notarize agreements in a live, two-way audio-visual session that's secure, easy to use and auditable.

Get started with Notary

To learn more about Notary, consult the product [datasheet](#). For further discussion, [contact us](#) or reach out to your sales representative.

1 DocuSign research conducted by Qualtrics, May 2021
 2 Fidelity, Rethinking the Onboarding Process: The Impact of Digitization for Advisors and Investors, 2021



About DocuSign
 DocuSign helps organizations connect and automate how they prepare, sign, act on, and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature, the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, over a million customers and more than a billion users in over 180 countries use the DocuSign Agreement Cloud to accelerate the process of doing business and simplify people's lives.

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