

Deliver a Modern Customer Experience

Customers expect fast, seamless, mobile access to their bank. At the same time, the ever-shifting financial services regulatory landscape makes it challenging to mitigate risk and stay compliant. DocuSign helps you speed up transactions with mobile-first agreements and mitigate compliance and security risks with digital audit trails and a suite of identification and authentication options.

Streamline agreement management

From onboarding to loan processing and wire transfers, every transaction involves complex agreements. With the right tools you can automate and digitize agreements by transforming complex static forms into intuitive, easy-to-complete digital forms, identifying your customers digitally, and capturing information accurately the first time, resulting in faster processing and happier customers.

Leverage artificial intelligence (AI) to assess risks

Get 360-degree visibility into what is inside your agreements, regardless of source location. With DocuSign Insight and DocuSign Analyzer you can identify risks, obligations, and opportunities that exist within your organization.

Enhance security and simplify compliance

Maintain a digital audit trail of all agreements, a complete, time-stamped history of every send, view, print, sign, or decline action. A tamper-evident, court-admissible Certificate of Completion ensures you can comply with most prominent regulations like KYC/AML.

Minimize IT costs and enhance time to value

Implement solutions to digitize your agreement processes within weeks and not months. Pre-built connectors and easy-to-use open APIs allow you to simply plug into existing core solutions, like Finastra and nCino, further automating document generation and sharing processes.

Results

15 of the top 15

financial services firms rely on DocuSign

95% decrease

in loan processing time from over an hour to just five minutes

Arizona Federal Credit Union

83% reduction

in time to open new customer accounts, from 12 days to 2 days

Santander

80% reduction

in average time to contract signature

Refinitiv

“When we talk about innovation, member experience and best-in-class security, DocuSign is quite literally in lockstep with where we want to take things.”

Thomas P. Novak
Chief Digital Officer
Visions Federal Credit Union

The DocuSign Agreement Cloud for Financial Services

In financial services, agreements are fundamental to the customer moments that matter, like opening an account, securing a loan, or transferring wealth. Asking customers to view tiny PDF forms on a mobile device is the opposite of a modern signing experience. The [DocuSign Agreement Cloud](#) integrates seamlessly into existing processes, allowing you to create a fast, frictionless agreement experience that increases conversion and customer satisfaction while maintaining security and compliance.

eSignature

Securely send and sign loan applications and disclosures electronically and maintain a complete audit trail.

Identify

Secure access to agreements for account opening, loan processing and more with a single platform that provides digital signer identification and authentication through enhanced methods.

CLM

Manage the full agreement lifecycle from automated generation to real-time negotiation to storage and search for complex contracts like institutional onboarding.

Rooms for Mortgage

Accelerate closing times and improve the borrower experience with a secure, digital workspace for everyone involved in a mortgage, including external participants like title and settlement.

Notary

Sign and notarize documents remotely and electronically via a secure audio-visual session. Mitigate risk with a robust audit trail that includes a tamper-evident recording and electronic journal.

Insight

Uncover blind spots, risk areas and untapped opportunities hidden in your agreements using AI-driven contract analytics.

Analyzer

Manage inbound risk and streamline negotiation of pre-executed agreements with the power of AI.

Integrations

Easily embed DocuSign into your existing tools with 350+ pre-built integrations with the leading lending platforms, including Salesforce, Finastra, nCino, and many more.

To learn more, go to docusign.com/financial-services

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.

Use case examples

Account opening

- Checking/savings accounts
- Signature cards
- Proof of identity
- Consent forms
- KYC

Lending

- Loan/mortgage applications
- eConsent
- Loan estimate/waiver
- Broker contracts
- Underwriting documents
- Lien releases and waivers
- Powers of Attorney

Customer service

- Terms of use
- W-8/W-9
- Address/beneficiary changes
- Transaction disputes

Audit and compliance

- Capture consent
- Regulation E
- KYC

“We took onboarding new clients into our systems from a 12-hour process down to the click of a button. When you’re looking at 200 to 300 accounts per month, that’s a pretty high volume.”

Kim Wargo
Associate Vice President
FineMark Bank


DocuSign Agreement Cloud

DocuSign, Inc.
221 Main Street, Suite 1550
San Francisco, CA 94105

For more information
sales@docusign.com
+1-877-720-2040

docusign.com