

Builders & Tradesmen's Insurance Services, Inc.

BTIS Bonds E-Signature Guide - E-Sign Now Instructions for the signing individual

This Guide

This guide offers instructions to the Signer on how to complete the e-signature process for our Victory[®] Contractor Bonds product. Follow these steps if you are the one signing.

You will find information, reminders and key requirements noted in the navy blue boxes on each page of the guide.

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	Address:	123 Main St.	
	City:	Portland	Phone: (541)111-2233
	State:	OR	Fax:
	Zip Code:	97520	
To begin the	e issuance and		Previous
•	process, click		
	Bond button.		

A	PPLICATION			
	1. ELIGIBILITY QUESTIO Question	N(S)	YES	NO
		d by the applicant been ca mburse payment of a claim		No
	2. MAILING ADDRESS - T Address: 123 Main St		AT WILL APPEAR O	N THE BOND
	City: Portland	Phone:	(541)111-2233	
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	Zip Code: 97520			
	E-Sign Now	Email to Applicant fo	or E-Signature	Print
online Bond Applic office and have the	client can sign the cation right in your e signed copy emailed minutes! Click on the	Previous		

1. E	E-Sign Now Applicant Name: Applicant Email Address: Retype Email Address:	sandy@contractor.com	×
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	State: OR State: 97520	Fax:	
	E-Sign Now Ema	ail to Applicant for E-Signature	Print
A new window will po Applicant's email add <u>E-Sign Now</u> to contin	ress and then click		

E-Sign N	ow				×
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	Eligibility Questions - Please provide additional of 1. Has any bond held by the applicant been cancelled	letail for "Yes" responses in the b for tailure to fully reimburse pay	oxes provided below the questi ment of a claim against a bond	will be a green arrow that will highlight how to get through the E-Signature	
	INDEMNITY AGREEMENT - READ			process in the appilcation.	
Stort	The Undersigned hereby dealars he tuth whour resonal for. The Undersigned agrees that the Sarely at its usia disc whatsoever to the Undersigned. In consideration of the issue any nerveal, continuations, merease or extension of time of Sarely to assess their oraclin reports and to make such perfor- sion and users interesting running to Oracle. All the con-	reton may decline the Bond(s) apple ince of the Bond(s) herein applied for the said Bond(s), the Undersigned h ent incuiny as may be necessary from	ed for or may cancel or terminate or c, or any Bond(s) in substitution for vereby agrees, jointly and severally financial institutions, persons, firm	or in succession of the said Bond(s), or , as follows: (1) To hereby authorize the said comparations: in order to (a)	~

ir signe	sign: Bond Applic ad form will be sent to BTIS	Inc.					+	
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	Agent Jane			CTN .			_	
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Review Your Signature	
Sandy Contractor (Ja	
	To E-Sign, the Applicant must type their full name as
I would like to draw my signatur	they would sign it in the field provided. As the Applicar
	types in their name, it will appear on the signature line
Apply <u>Cancel</u>	
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	Addres City:	Portla		Phone:	(541)1	11-2233		
	State:	OR		Fax:				

You will be taken back to the Bond Application showing the applied E-Signature. You will see instructions on this green call out. Use the scroll bar to scroll all the way down to see the <u>Click</u> to sign button at the bottom of the screen.

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To finalize the E-Signing process, click on the **<u>Click to sign</u>** button at the bottom of the screen.

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1. Has any bond held by the applicant been cancelled for No failure to fully reimburse payment of a claim against a bond?	
 Has any bond held by the applicant been cancelled for No failure to fully reimburse payment of a claim against a bond? 	
 Has any bond held by the applicant been cancelled for No failure to fully reimburse payment of a claim against a bond? 	
 Has any bond held by the applicant been cancelled for No failure to fully reimburse payment of a claim against a bond? 	
failure to fully reimburse payment of a claim against a bond?	
2. MAILING ADDRESS - THIS IS THE ADDRESS THAT WILL APPEAR ON THE BOND	failure to fully reimburse payment of a claim against a
	2. MAILING ADDRESS - THIS IS THE ADDRESS THAT WILL APPEAR ON THE BOND
Address: 123 Main St.	Address: 123 Main St.
City: Portland Phone: (541)111-2233	City: Portland Phone: (541)111-2233

You will receive this confirmation message advising the Bond Application has been successfully signed and completed. You have the option to save/print the signed Bond Application, however you can also choose to wait for the Bond to be issued. The Agent will have access to the full Bond packet, including the signed Bond Application, after issuance.

From: BTIS [mailto:echosign@echosign.com] Sent: Wednesday, January 06, 2016 2:52 PM To: echosign; Applicant's Email Address Subject: Bond Application Number QCBA1234567 between BTIS and Applicant Name is Signed and Filed!



POWERED BY Adobe EchoSign

Send. Sign. Done.



Bond Application Number QCBA1234567 between BTIS and Applicant Name is Signed and Filed!

From: BTIS Inc. (BTIS) To: BTIS Inc. and Applicant Name

Notifications have been automatically sent to all parties to the agreement.

You can view the document in your Adobe Document Cloud account.

Why use Adobe Document Cloud:

- Exchange, Sign, and File Any Document. In Seconds!
- Set-up Reminders. Instantly Share Copies with Others.
- See All of Your Documents, Anytime, Anywhere.

To ensure that you continue receiving our emails, please add echosign@echosign.com to your address book or safe list.

The Applicant will also receive an email confirmation after the E-Signature process has been completed. The Applicant will have the option to view/print the Bond Application however the full bond package will be available after issuance.

	 Verify Submission ✓ I have reviewed all information in the application for SANDY CONTRACTOR and verified it's accuracy. 	
	2. How do you want to pay?	
APPI 1.6	 E-Check (no fee) Credit Card (2.75% fee applies) Agency check is being mailed to BTIS 	
	3. Review Effective Date	
	Effective Date: 01/22/2016	
	To change the effective date of the bond please return to the Rating Info screen.	
2.1	Purchase Bond	DNE
	State: OR Fax: Zip Code: 97520	
(E-Sign Now Email to Applicant for E-Signature Prin	it

After E-Signature is complete, the Agent will be redirected to the **Bond Issuance Checklist** screen to complete issuance. Verify the submission, select the payment option, review the effective date and click **Purchase Bond** to finalize issuance.

1	Home Address: 123 Main St. Home Cit Home Sta Home Zip Home Zip
	Bond I 1. Verif I. Verif I. Verif SAND 2. How do you want to pay?
APPL 1.E	 E-Check (no fee) Credit Card (2.75% fee applies) Agency check is being mailed to BTIS Review Effective Date Effective Date: 01/22/2016 To change the effective date of the bond please return to the Rating Info screen.
2.1	Purchase Bond
:	Zip Code: 97520 E-Sign Now Email to Applicant for E-Signature Print Cancel Previous

Before finalizing issuance, the Agent must complete the <u>Agent Acknowledgement</u>. Click <u>Purchase Bond</u> to complete issuance.

9

Question		YES NO
fai		r the applicant been cancelled for No rse payment of a claim against a
. MAILING	ADDRESS - THIS	IS THE ADDRESS THAT WILL APPEAR ON THE BO
Address	: 123 Main St.	
City:	Portland	Phone: (541)111-2233
State:	OR	Fax:
Zip Code	97520	
1. Pr	int Bond Package	2. Print Invoice Home

Once the Bond is issued, the Agent will have access to print the Bond Package and Invoice. Click on the applicable buttons to print the desired items. These items will also be available online in the event that the Agent wants to print at a later time. And that's it!