

Clients can't come to see you? *No problem!* Columbian's Preneed Telesale Application Process allows you to take an application over the phone and email it to your client for signature. It's a convenient way to complete the sale in a simple transaction by phone and email, getting the policy issued and your commissions paid quickly and easily.

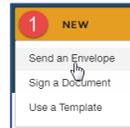
See the reverse for details.

## Getting Started on DocuSign

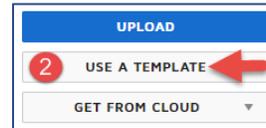
1. Complete the CFG Preneed DocuSign User Request provided to you by your Regional Sales Director and send it to Christine Clifton at [Christine.Clifton@cfglife.com](mailto:Christine.Clifton@cfglife.com).
2. You will receive an email from DocuSign asking you to activate your account. Tap or click the **ACTIVATE** button and complete the account registration process.
3. Select the **Edit** button in the **MY DOCUSIGN ID** section to personalize your profile.

## Completing and Sending the Application for Signature

1. Select **New**, then select **Send an Envelope**.



2. Select **USE A TEMPLATE**.



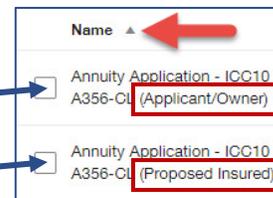
3. Under **Shared Folders**, select the folder for your state.



4. Check the box next to the forms needed, and click **ADD SELECTED**.

*Please note that there are two versions of each form, which differ depending on who will be signing:*

- Select the "Applicant/Owner" version if the Proposed Insured will not be signing the application.
- Select the "Proposed Insured" version if the Proposed Insured will be signing the application.



**HINT:** Click on "Name" at the top of the list to sort alphabetically

5. Add recipients to the envelope.

1. As Agent, you will be the first recipient so that you can complete and sign the application before DocuSign sends it to the client. Enter your name and email address in the spaces for Agent.
2. Enter the client's name in the next section, which will be labeled Proposed Insured or Applicant/Owner, depending on which signature version you selected.
3. The third section is for the CFG Preneed Team to receive a copy when the documents are completed and signed. Do not make any changes to this section.

6. Enter a subject and message if desired, and select **SEND NOW**.

7. Click the **REVIEW DOCUMENTS** link in the email you receive from DocuSign. Complete the application and apply your electronic signature, then click **FINISH**.

## Client Signature

The client will receive an email asking them to review and sign the completed form(s). They will:

1. Select the **REVIEW DOCUMENT** link and review the completed form(s).
2. Apply their electronic signature where indicated, and click **FINISH**.

*There is no need to submit the application!* You will receive an email letting you know that the document has been completed, and the application will automatically be sent to the Preneed Team at the same time. You can click the link in the email to see the completed document, but there is no need to fax, mail or upload the application to the Company because we'll already be working on getting the policy issued and your commissions paid.