



LIBERTY
WEALTH SERVICES



Step-by-Step Guide How to eSign your documents



How to sign your documents

1. [Log into your account](#) using your log in credentials – If you have **not** created an account – please refer to the Secure Site Registration quick guide **HERE** and register as a new user.

The screenshot shows the Liberty Wealth Services website. At the top, there is a navigation bar with links for Home, What We Do, Products, Financial Goals & Priorities, and News & Research. A search bar is located on the right. The main content area features an article titled "5 financial mistakes to avoid in retirement" with a sub-headline "What to do (and not do) to help you stay on track." Below the article title is a blue button labeled "5 Mistakes To Avoid". To the right of the article is an illustration of a winding path with five numbered steps (1-5) leading to a checkered flag. At the bottom of the page, there is a purple login section with the heading "Log in to your account". A red circle with the number "1" is placed over the "CLIENTUSERID" input field. The login form includes a "CLIENTUSERID" field, a password field with a "Show" button, a "Remember User ID" checkbox, a "Log In" button, and a "New User" link. A "Forgot User ID or Password" link is also present.



2. If you are registered for Secure Site, you'll receive an email notification there is a document waiting for your eSignature.

Your signature is needed

Your Ameriprise financial advisor has requested your electronic signature on the following document:



- Locate the document in the Electronic Signature folder.
- Click Sign and follow the steps to submit your electronic signature.

If you have any questions, don't hesitate to contact your advisor or call Customer Service at 1.800.862.7919.



3. Locate the documents tab in the right-hand corner of the page. This is where you will locate documents, notifications, or pending tasks that your advisor may need you to complete.

4. Once you click on the documents tab, you will see that you have **Actions Required** highlighted in blue – **click** this link.

The screenshot displays the Liberty Wealth Services Ameriprise Financial client portal. The top navigation bar includes the Liberty Wealth Services logo, Ameriprise Financial logo, and links for Online Security Guarantee, Symbol Search, Chat, Contact Us, Help, Profile: DT PES044, and Log Out. The main navigation bar features tabs for Overview, Portfolio, Documents, Goals, Trade & Research, and Transfers & Tools. The 'Documents' tab is highlighted with a red circle labeled '3'. Below the navigation bar, the 'Overview' section shows Total Asset Value of \$3,142,384.53 and Total Cash Value of \$3,000,000.00. The 'Documents' section is highlighted with a red circle labeled '4' and contains a link: 'Your signature is requested on 2 new esign documents.' A red arrow points from the 'Actions required' section towards the 'Documents' section.



5. The documents that need your signature will highlight in blue, you will then **click** "Sign document"

Overview Portfolio Documents Goals Trade & Research Transfers & Tools Account Groups | 1 | 2 | My Adv

Documents

eSignatures Account Statements Tax Financial Confirmations Administrative Shareholder Uploads

Select a file below to begin the electronic signature process or to review a previously signed file. Signed files will only be available for 60 days. See [Electronic Signatur FAQ](#) for more information.

Name	Posted date	Status	Actions
Beneficiary Update	08/22/2024	Pending on 08/22/2024	5 Sign Document
Beneficiary Update	08/22/2024	Pending on 08/22/2024	Sign Document



6. You will be able to preview the document-ensuring all information is correct.

When you're ready to sign, **click** the e-sign button on the right.

The screenshot shows a document titled "Beneficiary Update" from Ameriprise Financial. The document includes a barcode, a service address for RiverSource Life Insurance Co. of New York, and client information. On the right side, there is a "Consent to eSign" section with a scrollable text area, a "Full name" field containing "DT PES044", and two buttons: "eSign" and "Decline eSign". A red circle with the number "6" is overlaid on the "eSign" button, and a red arrow points from the "Reference Number" field to it.

Service address:
RiverSource Life Insurance Co. of New York
70500 Ameriprise Financial Center Minneapolis, MN 55474

Beneficiary Update

Case

Ameriprise Financial

Client ID
70884075 6

Account Number
99108023328 005

Reference Number
LEB14265

Part 1 Client and Account Information

Client Name 1: DT PES044
Servicing Advisor Name: Fyvog Vozumi
Servicing Advisor ID: 25327

Consent to eSign

These documents, including terms and conditions, disclosures and agreements, were prepared for your review and approval. Your document(s) displayed in the window to the left can be reviewed by using the scroll bar. You have reached the end of the document(s) when you are unable to scroll any further.

Full name
DT PES044

eSign Decline eSign



Review and Sign your document(s) below

Service address:
RiverSource Life Insurance Co. of New York
70500 Ameriprise Financial Center Minneapolis, MN

Beneficiary Update

Consent to Receive Document(s) Electronically

Please review the following Consent to Receive Document(s) Electronically (the "Consent"). This Consent applies to the document(s) in this packet (the "Document Packet") and may apply to related information, communications and documents made available to you electronically.

Accept the electronic delivery to proceed to eSignature. Decline to reject electronic delivery and exit the eSignature process.

You will have the opportunity to review and sign the document(s) in subsequent steps.

You have expressed an interest to Ameriprise Financial Services, LLC ("Ameriprise") ("we" or "us") in:

- Opening a new account, and/or making a service request related to a new or existing account, client, policy, or application; and
- receiving, signing, and delivering back to us document(s) related to your relationship with us.

Documents to be provided electronically

All notices, disclosures, authorizations, acknowledgements, applications, agreements, forms and other documents which may relate to activities on your account(s) or your relationship with Ameriprise included in the Document Packet will be provided to you only in electronic form.

Consent to eSign

These documents, including terms and conditions, disclosures and agreements, were prepared for your review and approval. Your document(s) displayed in the window to the left can be reviewed by using the scroll bar. You have reached the end of the document(s) when you are unable to scroll any further.

Full name
DT PES044

[Decline eSign](#)

se
ancial

005

7 [Print](#) [Decline](#)

7. The "Consent to Receive Documents Electronically" prompt will appear. Click "Accept" to proceed. Next, you'll be able to review and sign the document in subsequent steps.



Spendthrift Clause. Except as otherwise specifically provided herein, no beneficiary entitled to any payment hereunder shall have the right to withdraw, surrender for cash, borrow against, commute, anticipate, encumber, alienate, or assign such payment, or any part thereof, or any interest therein, nor shall such payment, or any part thereof, or any interest herein be in any way subject to such person's debts, contracts, or engagements, nor to any judicial process to levy upon or attach the same payment thereof. No provision of this contract or beneficiary designation shall be construed to prevent the owner or the beneficiary from assigning its interest in this contract to a nursing home or a government agency to qualify for government assistance programs. This clause shall be effective to the extent permitted by law.

Part 5 Signatures and Consent of Spouse

Owner Name

DT PES044

Owner Signature

Date (MMDDYYYY)

8

X

DT PES044 2024-09-11 04:14:05 GMT

8. After clicking “Accept,” you will have the option to either type your signature or draw it using your computer mouse or finger to sign the document electronically.



●

Service address:
RiverSource Life Insurance Co. of New York
70500 Ameriprise Financial Center Minneapolis, MN 55474

Beneficiary Update

Client ID
70884075 6

CASE

Ameriprise  Financial

9

Successful eSignature
✓ Your digital signature has been successfully completed.

10

Continue Print

9. Once complete, a green checkmark will confirm that your signature has been successfully applied.

10. Hit continue to redirect to the document dashboard to sign the next document, and repeat steps



Documents

eSignatures

Account Statements

Tax

Financial Confirmations

Administrative

Shareholder

Uploads

Select a file below to begin the electronic signature process or to review a previously signed file. Signed files will only be available for 60 days. See [Electronic Signature FAQ](#) for more information.

Name	Posted date	Status	Actions
 Beneficiary Update	09/11/2024	Signed on 09/11/2024	
 Beneficiary Update	08/22/2024	Pending on 08/22/2024	 Sign Document

Showing all

10. Completion of a document is indicated by the blue hyperlink disappearing, and the status updating from “pending” to “signed” and the date of completion.

11. The e-signatures dashboard, displays any remaining documents awaiting your signature.



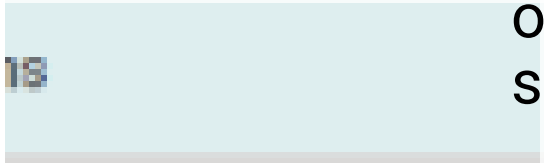
Documents



No new documents.

[Electronic Signature](#)

Your documents are now complete, and you may log out or return to the overview of your secure site profile.



[Sign Document](#)

[View Documents](#)

[Manage Delivery Preferences](#)

[Sign Document](#)

