



HubSync Portal – Document Signing

* Assurance, attest, and audit services provided by Auditwren, LLC and/or Carr, Riggs & Ingram, LLC.

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Invitation email – documents to sign

Example of the invitation email to sign documents is displayed below. Please follow on screen prompts to electronically sign documents.

NOTE: users do not need to create a HubSync portal account to be able to electronically sign the documents.

CRI Family of Companies <notifications@assuresign.com>

To: [REDACTED]



Mon 11/18/2024 7:40 PM



Why are you receiving documents to sign from AssureSign? CRI Family of Companies utilizes AssureSign to securely request and receive your electronic signature on various documents through HubSync, a platform that streamlines how you interact with your advisor, reducing the need for multiple logins, portals, and touchpoints. These efficiencies help our team serve you faster. **Next Steps?** Securely sign your document(s).

[Sign Your Document\(s\)](#)



Click the link to access documents.

Please note this link is not perpetual (i.e. it will expire). If your link has expired, please contact your advisor.

Do you still have questions? Check out our [Client Resources](#) page on [CRIadv.com](#).

Thank you,

CRI Family of Companies

Document signing powered by **Nintex AssureSign**.
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Document Signing – link to external page

Link from your email will direct you to the AssureSign website to digitally sign your documents. Click on "Start Signing" to begin this process.



A new document from CRI Family of Companies is available for you to sign.

By selecting start signing you agree to the terms and conditions.

Start signing



Document File Name

1 of 13



Additional options are available at the bottom of the page.

Ask sender a question



Decline signing



Download documents

Document Signing

Step 1: Click on "Adopt Signature"

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Please select the "Adopt signature" button to type or draw your signature to be applied to the document.

Back Adopt signature

Step 2: Select either Typed or Drawn signature style and click "Adopt Signature" to begin signing.

Adopt a Signature

Select a signature style

- Typed with a keyboard
- Drawn with touch, mouse, or stylus

Provide your name by drawing with touch, mouse, or stylus.

Signature

By clicking "Adopt Signature", I agree that the signature and initials above will be the electronic representation of my signature and initials for all purposes when I use them to sign documents. Applying them to a document is legally equivalent to signing with a pen on paper.

Adopt signature

Step 3: Click on "Apply Signature" to place signature in applicable signature blocks.

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Please sign by applying your previously adopted signature to the document; this is legally equivalent to signing with a pen on paper.

Back Apply signature

edit signature

Signing Complete – download files

Once all documents have been electronically signed, the final step will display “Submit”.



You're almost done.

You have entered all requested information and signatures. When ready, select **Submit** to complete the signing process.

Back



Submit

A confirmation message will be displayed, and you'll have an opportunity to download signed copies of the documents for your records.



You have successfully completed the signing process. Your document is complete and may be downloaded by clicking the button below.

Download document







Document File Name

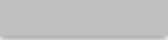


Click this button to download signed documents.



Signing Complete – email confirmation

- Confirmation email will be sent upon completion of all signatures.
- You'll have an opportunity to access documents envelope and download signed copies for your records.


 CRI Family of Companies <notifications@assuresign.com>     

To: 

Mon 11/18/2024 8:10 PM

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CRI Family of Companies HubSync document(s) signing has been completed. Please click "View Document(s)" to view of download the final signed copy.

[View Document\(s\)](#)  Click **View Document(s)** to download signed documents.

If your link has expired, please contact your advisor.

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