

DocuSign – A Client Guide

What is DocuSign?

DocuSign is an easy to use system which allows us to send, sign and manage documents securely in the cloud without printing and scanning

Multiple signatories

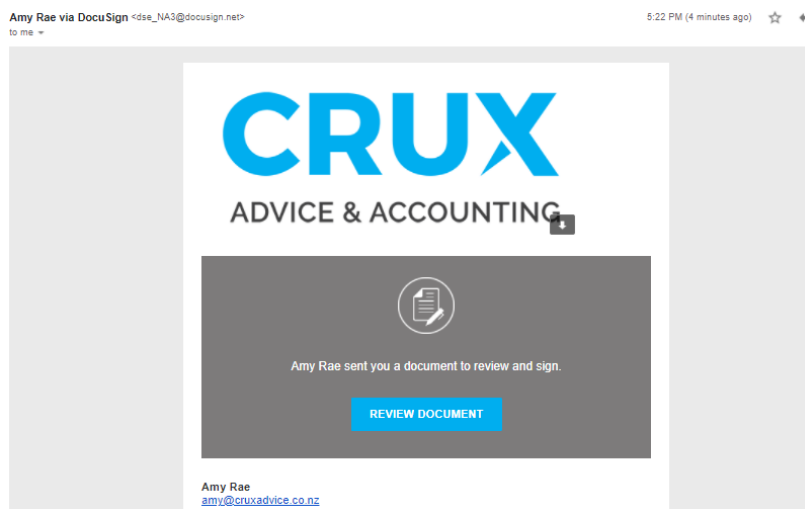
DocuSign works for both single or multiple signees.

For multiple signees the document sends in an order, once the first person signs the document will then be sent to the next person and so on until all signing is completed.

Once the document is completed all signees will receive an email where they can review or download the documents for your record.

How to sign your documents

1. You will receive an email from one of our team in the below form.



2. Click 'review document'.
3. This will open in the below screen once you have read the electronic record and signature disclosure. Tick 'I agree to use electronic records and signatures' and click 'continue'.

Please Review & Act on These Documents



Amy Rae
Crux

CRUX
ADVICE & ACCOUNTING

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Hello Josh Smith,

Please find attached our firm engagement letter for your signing.

If you have any questions please let us know.

Kind regards,

[View Lead](#)

Please read the Electronic Record and Signature Disclosure.
 I agree to use electronic records and signatures.

CONTINUE OTHER ACTIONS ▾

The purpose of this letter is to confirm the terms of our engagement. All services that we perform are subject to the terms set out in this letter (and the appendix).

CAANZ

As members of the Institute of Chartered Accountants Australia and New Zealand ("CAANZ") we are required to comply with the code of ethics and relevant professional standards issued. We are also subject to and bound by disciplinary procedures and rules. These procedures include practice review rules under which compliance with professional standards by members is monitored.

Information and disclosure

4. Click the 'start' button on the left hand side.

Please review the documents below.

FINISH OTHER ACTIONS ▾

START

DocuSign Envelope ID: 11C3635D-AB8C-4768-8AED-C24FD97922F

www.cruxadvice.co.nz

CRUX
ADVICE & ACCOUNTING

22 January 2021

Josh Smith

Dear Josh

Client Engagement – Josh Smith

The purpose of this letter is to confirm the terms of our engagement. All services that we perform are subject to the terms set out in this letter (and the appendix).

CAANZ

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5. Click the blue 'next' to take you to your first signature to be completed.

Select the sign field to create and add your signature.

FINISH OTHER ACTIONS ▾

NEXT

DocuSign Envelope ID: F5EBF315-F825-4F1B-87FB-129B72FC160B

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CRUX
ADVICE & ACCOUNTING

22 January 2021

Josh Smith

Dear Josh

Client Engagement – Josh Smith

The purpose of this letter is to confirm the terms of our engagement. All services that we perform are subject to the terms set out in this letter (and the appendix).


CAANZ

As members of the Institute of Chartered Accountants Australia and New Zealand ("CAANZ") we are required to comply with the code of ethics and relevant professional standards issued. We are also subject to and bound by disciplinary procedures and rules. These procedures include practice review rules under which compliance with

6. Click the yellow coloured box to sign - the date will automatically be completed.

Michael Parker
Director
Crux Advice & Accounting Limited

I agree with the [Required - Sign Here](#) terms, including the appendix.

Signature 

Name Josh Smith

Date 21-Jan-2021

SIGN

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7. If it is your first-time using DocuSign, there will be a pop-up box to adopt your signature. This is where you can use a premade signature or draw your own. Once completed click 'adopt your signature'.

The screenshot shows a pop-up window titled "Adopt Your Signature" with a close button (X) in the top right corner. The window contains the following elements:

- Text: "Confirm your name, initials, and signature."
- Text: "- Required"
- Form fields: "Full Name*" with the value "Josh Smith" and "Initials*" with the value "JS".
- Buttons: "SELECT STYLE" (underlined) and "DRAW".
- Section: "PREVIEW" with a "Change Style" link on the right. The preview shows a handwritten signature "Josh Smith" and initials "JS".
- Text: "By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial."
- Buttons: "ADOPT AND SIGN" (highlighted in blue) and "CANCEL".

8. This is what it will look like once you have inserted your signature.

The screenshot shows a document with the following content:

- A horizontal line.
- Text: "I agree with the above engagement terms, including the appendix."
- Text: "Signature" followed by a handwritten signature "Josh Smith" on a line.
- Text: "Name" followed by "Josh Smith" on a line.
- Text: "Date" followed by "21-Jan-2021" on a line.

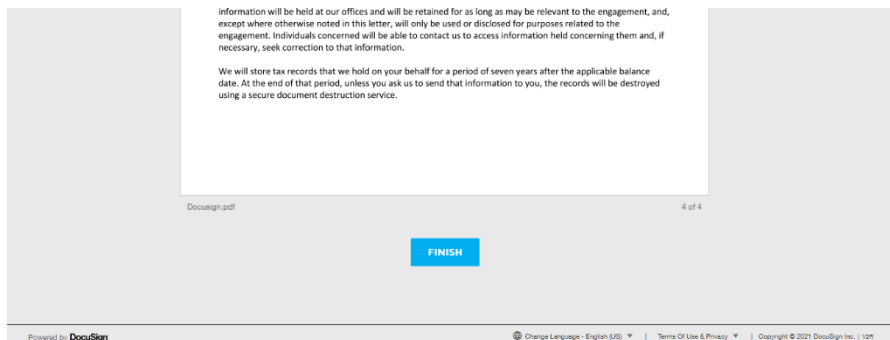
9. Keep clicking next and repeating the signing steps (5&6)

The screenshot shows a DocuSign document viewer interface. At the top, it says "Select the sign field to create and add your signature." and has "FINISH" and "OTHER ACTIONS" buttons. Below this is a toolbar with icons for search, zoom, download, and print. The main document content is as follows:

- DocuSign Envelope ID: F5EBF315-F825-4F1B-87FB-129B72FC1608
- www.cruxadvice.co.nz
- CRUX ADVICE & ACCOUNTING logo
- Date: 22 January 2021
- Name: Josh Smith
- Text: "Dear Josh"
- Section: "Client Engagement – Josh Smith"
- Text: "The purpose of this letter is to confirm the terms of our engagement. All services that we perform are subject to the terms set out in this letter (and the appendix)."
- Section: "CAANZ"
- Text: "As members of the Institute of Chartered Accountants Australia and New Zealand ('CAANZ') we are required to comply with the code of ethics and relevant professional standards issued. We are also subject to and bound by disciplinary procedures and rules. These procedures include practice review rules under which compliance with"

A "NEXT" button is visible on the left side of the document viewer.

10. Once you have signed all your required areas, scroll to the bottom and click 'finish'



11. If you want to create a DocuSign account, complete the details, if you prefer not to, click no thanks.

A screenshot of the DocuSign account creation form. The title is "Save a Copy of Your Document". Below the title, there is a link to "Sign up for a FREE DocuSign account today and sign all your documents electronically." The form contains the following fields: "Email" with the value "kanefin96@gmail.com", "Password" (empty), "Confirm Password" (empty), and "Country" (dropdown menu showing "-- select --"). To the right of the form, there are three icons with corresponding text: "Electronically sign any document.", "Get signatures from others.", and "Sign on the go with DocuSign Mobile!". At the bottom of the form, there are two buttons: "SUBMIT" and "NO THANKS". A disclaimer at the bottom left states: "By clicking the 'SUBMIT' button, you agree to the Terms & Conditions and Privacy Policy."

12. You have now completed everything in DocuSign. Your documents will be emailed to you as PDF's once all signers are done. Please note, you may not receive these straight away as there may be multiple signers after you.

DocuSign

You're All Done!

You'll receive a copy once everyone has signed.

