

DECEMBER 5, 2022



# LIFE ESSENTIALS

## Information on the availability of DocuSign on post issue transactions

### What forms can be sent via DocuSign?

- EFT Enrollment form
- Beneficiary Change form
- Loan form
- Accumulated dividend Withdrawal form (Legacy policies only)
- PUA Surrender form (Legacy policies only)

### Who is eligible to receive these forms via DocuSign?

- Single individual ownership policies

### Who is not eligible?

- Agents/FMAs
- Trust owned policies
- Multiple owners/trustees
- Business/trust company owned policies

### DocuSign Fun Facts:

- Prefilled forms can be sent via DocuSign, as well as blank forms.
- If the client needs to attach additional documents (i.e., copy of a voided check, supporting beneficiary change information), the client can attach external documents to the forms through DocuSign.

### What are some additional limitations/restrictions?

- High-Risk Transaction (HRT) authentication is currently required to send via DocuSign. This means the client will need to receive a text message or email passcode on the phone call, to validate their identity.
- Forms sent through DocuSign are sent like any other emailed document, meaning the caller will receive the form via email after the call is complete.

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- Forms sent via DocuSign will expire/void after 30 days; the customer will receive reminder emails including a reminder before the form is “expired.”
- Policies with a foreign address are not eligible for DocuSign.
- If the owner resides in Massachusetts, they are not eligible for DocuSign.
- For EFT Enrollment form, if the depositor is not the policyowner, we cannot send the form via DocuSign.
- For any of the disbursement forms noted above, DocuSign is not available if any of the following apply:
  - Special mailing address is requested.
  - Address was changed within the last 30 days.
  - Wire transfer is requested.
  - Amount requested is \$100,000 or more.
- If the email address we have on file is not current or we do not have an email address on file, DocuSign is not available, but will become available after the new email address has officially been added to the policy (this takes 2 – 3 days, as all the back-end systems need to be updated before DocuSign becomes an available option).

**NOTE:** A recent address change does not affect DocuSign being available, with the exception of disbursement forms as noted above.

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