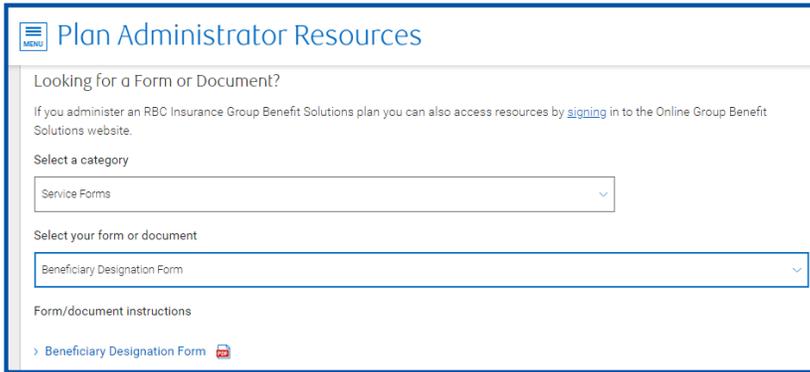




# How to **Complete** and **eSign** a fillable PDF form

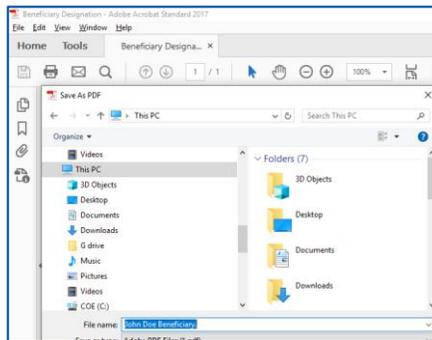
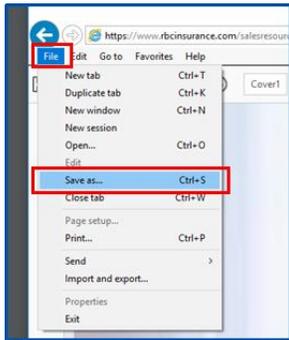
**Note:** These instructions are intended for desktop and laptop users only.

**Step 1:** Select the fillable form from the [Plan Administrators Resources page](#)

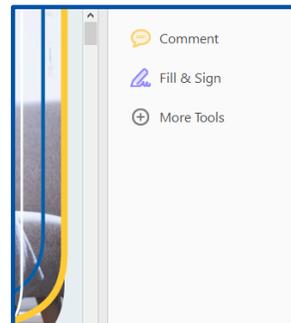
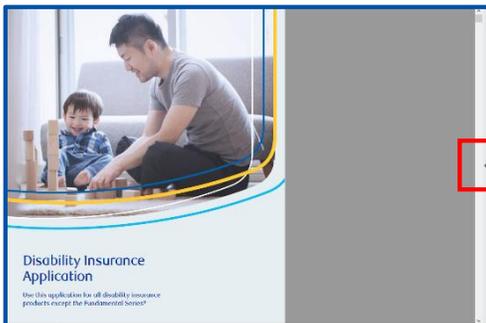


The integrity of the client information is kept intact when using Adobe, available [here for free](#).

**Step 2:** Save the file to your computer by selecting **“File”** menu, and choosing **“Save As”** from the drop down option.



**Step 3:** Retrieve the saved copy from your computer and Select the **arrow** to open the **“Edit panel”** to begin completing your form.

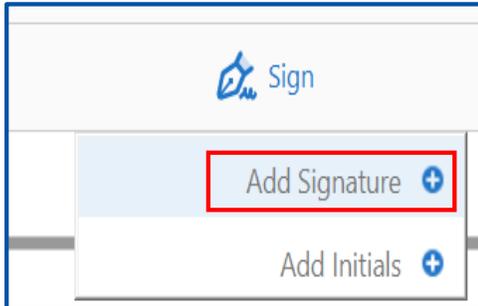


Please note if you have **“Chrome's built-in PDF viewer”** you cannot sign using Chrome. To use the sign functionality launch Adobe Acrobat Reader and open the application from there to enable the functionality above.



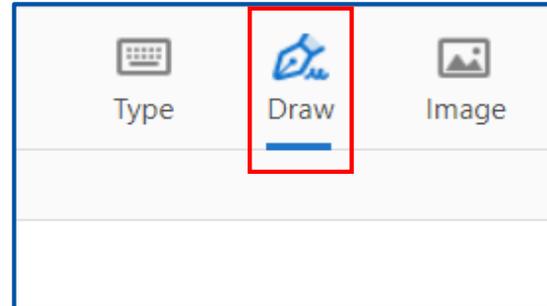
### Step 7:

Click **"Add Signature"** and allow your client to eSign 1<sup>st</sup>, once they complete all their signatures, you can create your own and insert in the Advisor sections.



### Step 8:

Please note all signatures must be **"Drawn"** in order to be accepted as a legal binding signature. Please **do not use the "Type"** option to create signatures.



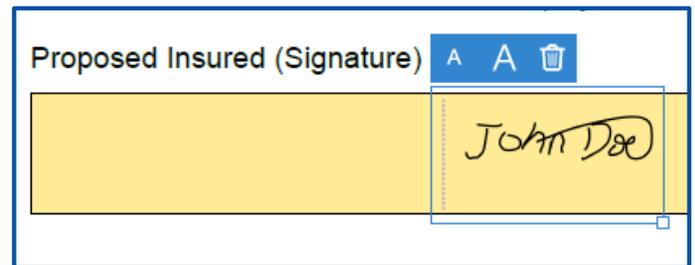
### Step 9:

Draw your signature using a mouse and click **"Apply"**



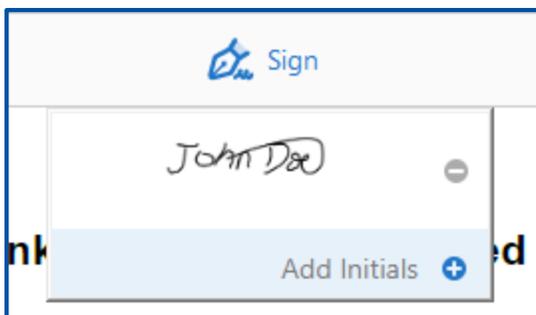
### Step 10:

Place the signatures in the document by **dragging and releasing your mouse.**



### Step 11:

To add it again in the document click **"Sign"** and select the signature



### Step 12:

Once the form is completed, **save** the completed form to your machine.

**Important Note:** Once signatures have been added to the fillable form, you can no longer modify or edit the document.