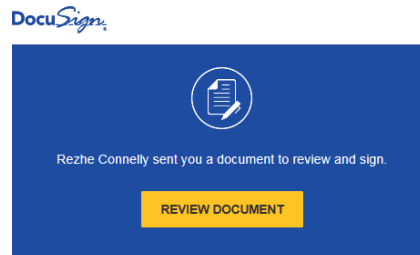


1) To start the process, select the "Review Document" icon in the email.



2) Before you begin electronically signing the credit builder loan documents, you will need to select the box indicating that you agree to use electronic records and signatures. Select "Continue".

Please DocuSign the Credit-Builder Loan Documents.

A screenshot of a DocuSign consent screen. The top bar is blue and contains a yellow arrow icon, the text "Please read the [Electronic Records and Signature Disclosure](#)", a checked checkbox "I agree to use electronic records and signatures.", a yellow "CONTINUE" button, and a link "OTHER ACTIONS". The main content area is grey and titled "AUTHORIZATION TO RELEASE INFORMATION". It contains the text: "I, Jane Doe, authorize Great Rivers Community Capital to supply any information regarding the status of my loan and savings account to my Centers for Working Family financial coach and the Local Initiatives Support Corporation of Chicago."

3) Fill in your full name, as well as your initials. These are used to electronically sign your document. Then select "Adopt and Sign".

A screenshot of the "Adopt Your Signature" screen. The title is "Adopt Your Signature" with a close button (X). Below the title, it says "Confirm your name, initials, and signature." There are two input fields: "Full Name" with the value "Jane Doe" and "Initials" with the value "JD". Below these fields are links for "Select Style" and "Draw". A "PREVIEW" section shows a signature "Jane Doe" and initials "JD" in a blue box, with a "Change Style" link. Below the preview, there is a small disclaimer: "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." At the bottom, there are two buttons: "ADOPT AND SIGN" and "CANCEL".

4) Follow the prompts to "sign".

5) Place a check in the appropriate user defined section, enter your name next to Counselor/Analyst, circle "walk-in" or "meeting" and enter the total number of hours spent with the client.

Loan Tab:

Purpose of Loan: Credit Building
Transaction type: Term
Interest Type: ALWAYS FIXED
Collateral: Other Savings account
Collateral Position Collateral: 1
Collateral Estimate Market Value: \$300.00

User Defined:
Is Client Female Headed Household? Yes No
Is Client Low-income (under 80%)? Yes No

Contacts:
Counselor/ Analyst:
Type: Walk-in/ Meeting

Total Hours Spent with Client:

6) Select finish. The document will be automatically emailed to twinaccounts@justinepetersen.org, the client, and the financial coach. You do not need to mail a copy to Great Rivers Community Capital.

7) You will be asked to sign up for DocuSign, this is optional. (select "no thanks").

The document is now complete.
Thank you!