

Gerber eSignature client Walkthrough (if you can't do voice Sign (after hours))

Step 1 In the app Instead of sign “Face to Face”. you choose **“email and save”**.
Sign the agent stuff on your end that pops up.

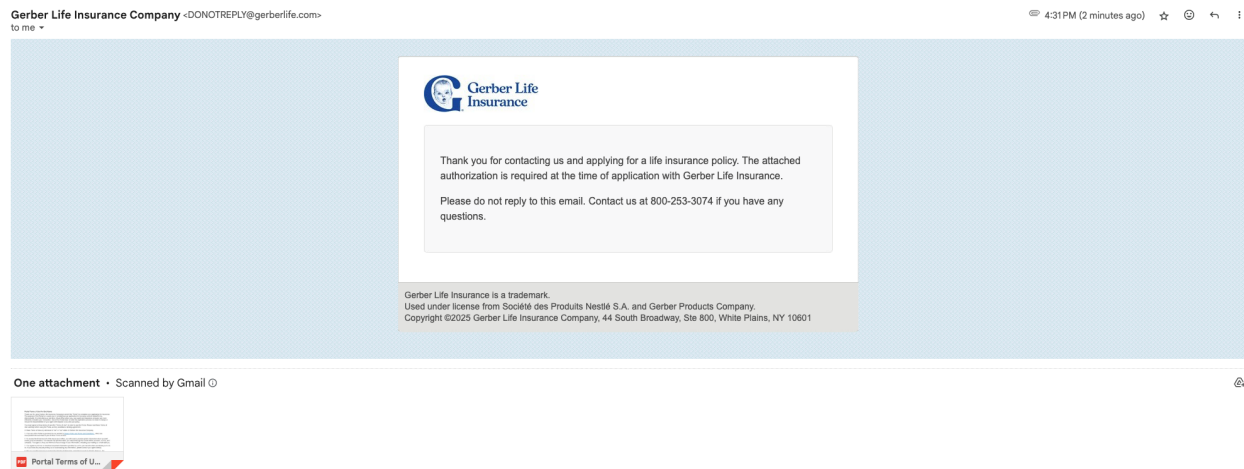
Meanwhile **On their side:**

It sends them 2 emails that should look something like this in their inbox.

▷ eSignature DO NO...	Don't forget to sign your application! - Don't forget to sign your application! Thank you for choosing Gerber Life to help you with your i
▷ Gerber Life Insura...	Gerber Life Insurance Company Portal Terms of Use - Thank you for contacting us and applying for a life insurance policy. The attach  Portal Terms...

Step 2 Have them Open the two Emails in their inbox.

1st one looks like this in the screenshot below when they open it. Attachment at the bottom is the required disclosure doc. **Nothing for them to do on this one other than acknowledge that they got it and read it.**



Step 3 Have them Open the other email that says “eSignature DO NOT REPLY via Docusign”

This email looks like this one in the screenshot below. This is where the money is made. If they say they are not seeing anywhere to do anything it's because they are still in the 1st email or the disclosure attachment. Tell them to go look in the other email.

In this one they either need to click **the big blue button that says “Electronically Sign Your Documents”**

or

the little blue link that says please “click here” in the first paragraph

Don't forget to sign your application! [Inbox](#) x

 eSignature DO NOT REPLY via Docusign <dse_NA4@docusign.net>
to me *



Don't forget to sign your application!

Thank you for choosing Gerber Life to help you with your insurance needs. Before we can complete the application process for new insurance, we need your electronic signature. Please [click here](#) to view and sign your online application. This link is valid for 21 days.

[Electronically Sign Your Documents](#)

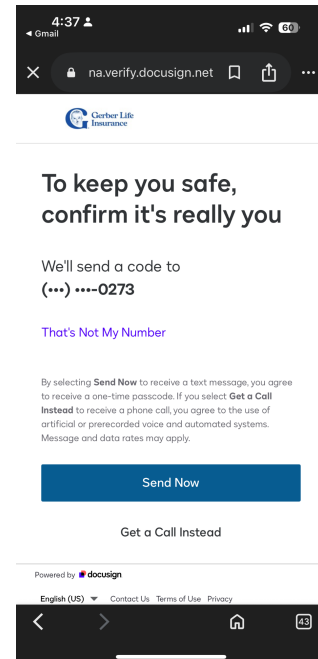
During the electronic signature process, you will be asked to acknowledge your acceptance of the application, disclosures and consents. Follow the prompts to add your electronic signature to the document.

Thank you for choosing Gerber Life.

Secure Insurance Group
nate@wayfirelabs.com

Step 4

When they click on that link in the 2nd email above it sends them to this screen. Where they need to click the blue **Send Now** button.

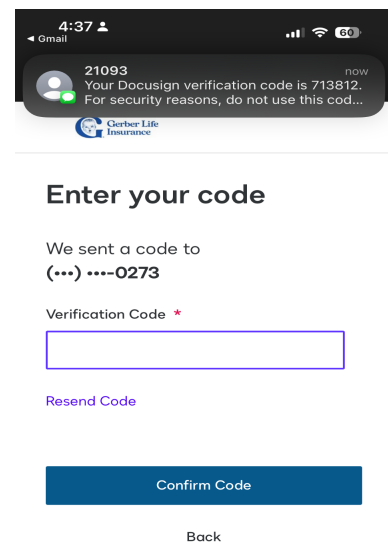


Step 5 (This is where they usually get lost.) Help them find the verification text and the security code on their cell.

When they just hit the Send Now button a second ago, **it should have opened the “Verification code” entry form box on the same screen with a purple outline as shown below.**

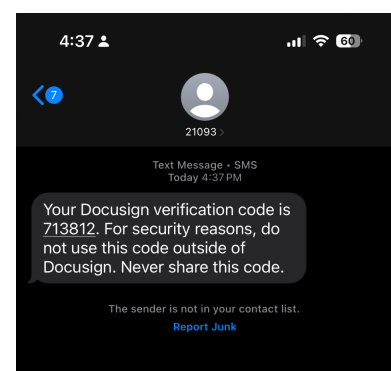
And simultaneously:

It should have just sent them a text which popped up a verification code notification like this one below, BUT lots of seniors don't have their notifications enabled, so they may have to go and find the text in recent messages. Make sure they keep this screen with the “enter your code” box open so they can put the code in when they find it from the text.



The EXACT verification text to tell them to look for reads like this and it comes from a 5 digit number, so that could make it hard for them to notice if you don't mention it:

The text itself says: *“Your DocuSign verification code is “#####”, do not use this code outside of DocuSign. Never share this code.”*



Step 6 Have them go back and **enter the verification code on the screen in the entry box on the screen they sent the text code from and hit next.** It should start to open docuSign and **on iphone make sure they click “allow” when this message pops up.**

Step 7 It should then pull up the docuSign and be pretty straightforward, but just in case... here is the rest!
Have them click the blue **“Next Signature”** button, which will send them to the purple **“sign”** button. Tell them to Tap the purple sign button.

The screenshot shows a mobile app interface for a DocuSign document. At the top, the status bar shows 4:38 and battery at 60%. The app's address bar shows 'apps.docuSign.com'. Below the address bar is a 'Review and complete' header with a blue 'Next' button. The form itself is a life insurance application. It includes sections for: 'Primary Phone' (720 785 0273), 'Are you a United States citizen or do you have Permanent Legal Resident (Green Card) status?' (Yes), 'CHECK THE AMOUNT OF LIFE INSURANCE WANTED' (\$5,000 to \$25,000), 'OWNERSHIP INFORMATION' (First Name, Last Name, Relationship to Insured, Social Security Number, City, State, Zip, Email Address, Phone), 'BENEFICIARY INFORMATION' (Primary Beneficiary: EBBY, Contingent Beneficiary:), 'OTHER COVERAGE' (Does the Proposed Insured have any life insurance or annuities in force or is any application for life insurance or reinstatement now pending? Yes), and 'ACKNOWLEDGEMENT OF INFORMATION PROVIDED' (It is understood and agreed that: All statements and answers made in all parts of this application are true and complete to the best of my knowledge and belief, and shall be the basis for and become part of any policy issued as a result of this application. Any person who knowingly presents a false statement in an application for insurance may be guilty of a criminal offense and subject to penalties under state law. Any policy issued will not take effect until it has been approved and the initial full premium(s) due have been received by the Company within the proposed insured is alive and all statements and answers in all parts of the application continue to be true and complete. I will notify the Company of any changes to the statements and answers given in any part of the application which occur before the policy is issued and payment is received by the Company. Signature of Proposed Insured: [Signature] Date: 10/6/2025. Signature of Policyowner (if other than Proposed Insured): [Signature] Date: . Signed at (City, State): Engle Mountain UT. The document ID is KCC12-ADWPL.

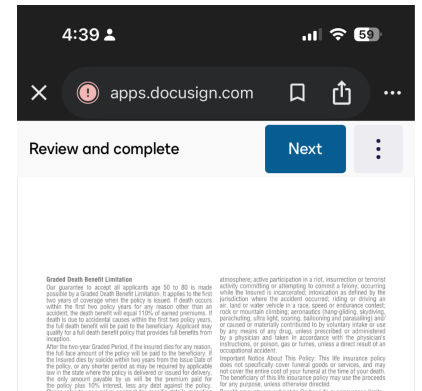
Step 8 That will pull up this screen below which defaults to have them **Draw** their signature. If they are struggling, I would recommend having them do the **“Select Style”** option to the left of “Draw” which auto fills it in a font. Then have them click the blue **Adopt and Sign** button, because they are probably not going to like the signature that their finger does on their phone, with the Draw option.

The screenshot shows the 'Adopt Your Signature' screen. It prompts the user to 'Confirm your name, initials, and signature.' with input fields for 'Full Name' (John Doe) and 'Initials' (JD). Below these are three options: 'SELECT STYLE', 'DRAW' (which is selected and highlighted in blue), and 'UPLOAD'. A dashed box labeled 'Draw your signature' is shown. At the bottom, there is a blue 'Adopt and Sign' button and a grey 'Cancel' button. A disclaimer at the bottom states: '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.'

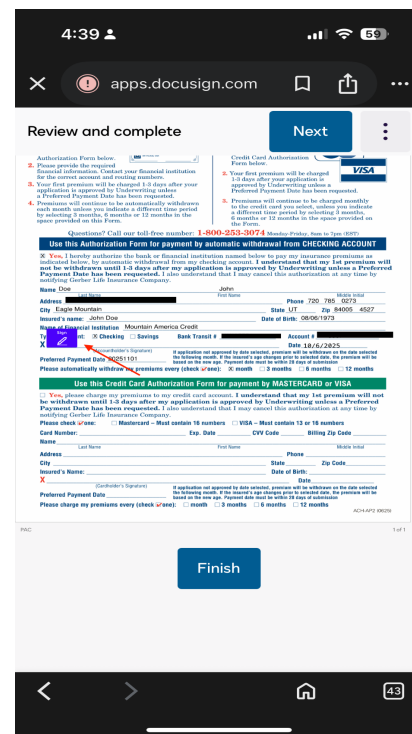
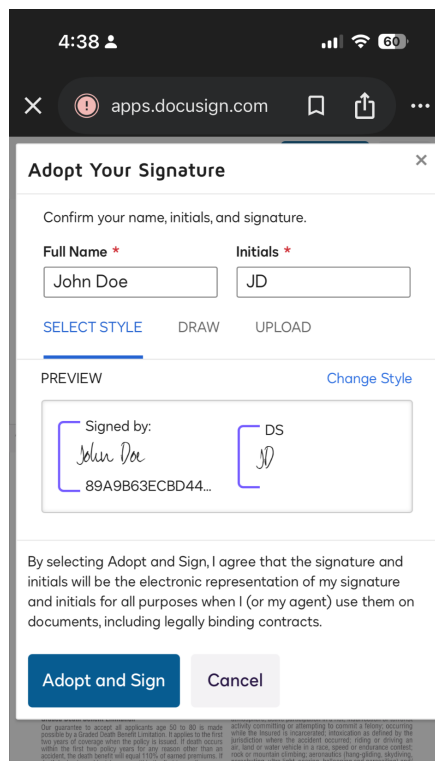
This screenshot shows the 'Adopt Your Signature' screen after the user has selected a signature style. The 'DRAW' option is still selected, but a 'PREVIEW' section is visible, showing a sample signature 'John Doe' and initials 'JD' in a blue ink style. A 'Change Style' link is next to the preview. The 'Adopt and Sign' button is now blue, indicating it is the active option. The disclaimer at the bottom remains the same.

Step 9 They will probably think they are done after the first signature. They are not. They still need to click the blue **“Next Signature box** at the top again or just scroll down and click the next purple signature box.

If they don’t click the “Next” button and do just scroll down after filling the first signature, they will scroll past a screen in the application that looks like this:



And as they scroll further, they will then come to a screen that looks like this where the second signature we need from them is located. Have them tap that purple “sign” box and sign or adopt signature like they did on the first signature. And then **make sure they click “Finish”** and let you know :



For your sanity: When you check In the Gerber agent portal on app status of e-signatures, it will say “success” on your agent signature but will usually take 30 minutes or more to show the clients.

eSignature status details				
Signer name	Signer role	Status	Description	Reset phone number
Nathan Riggle	Agent	Success	2025-10-06 18:31:54.823	
John Doe	Applicant	Awaiting	2025-10-06 18:31:20.013	... - ... - ... Reset