

Annature User Guide

Electronic Signatures

Electronic signing has great benefits for Heffron, documents sent electronically are turned around 7 times faster than those sent via post. However, our customers tell us they love it just as much as we do. It's an immediate win for trustees who don't all live together or who travel a lot of the year, tax lodgement is much faster and there is less confusion on who needs to sign where. The security benefits are clear too. We can be confident that our client's financial data goes directly to them and is not at risk of getting lost in the post. Annature provides full document encryption to ensure the privacy of your data. Documents stored in the ISO 27001 and SSAE 16 data centres are encrypted with the highest levels of encryption.

Only you and individuals authorised by you have access to your documents. Apart from the personal wins, Heffron, advisers and trustees are all taking a small step towards a paperless, greener future.

Currently, Heffron's preferred electronic signing platform is Annature. Visit annature.com.au to learn more.

Support

If you are a first time Annature user or just need a refresher, visit heffron.com.au to access our support materials or contact Heffron's Client Relations Team on 1300 172 247 or clientsupport@heffron.com.au

Receiving your signing pack

1. Signing packs will be sent to the preferred email address we have on file and the sender will display as "Heffron SMSF". The subject line will indicate which documents have been sent for signing e.g. in the image below, it is the 2022 financial accounts.



2. Open the email and ensure your name is in the subject line of the email. If you share an email address with another trustee in your SMSF, you will each receive an email in your inbox. It is important you check the name at the top of the email to ensure you are signing your own document pack.

Dear Joe Superannuation,

Thank you for continuing to partner with Heffron.

Your fund's Financial Statements are now ready for review and signing. You are required to open, review, and sign the financial statements. To commence reviewing and signing the documents you must click the button labelled "review documents"

For security purposes you will be asked to provide a password prior to accessing the documents.

Your password will be your residential postal code.

When all parties have signed the Financials, you will be sent a final email from Annature. This email will contain a PDF copy of the signed Financial Statements that can be downloaded for your records.

If you have any questions about these documents or your password, please contact Heffron's Client relations team on 1300 433 376 or clientsupport@heffron.com.

Kind regards,

Heffron Consulting

3. After reading the email message you will be directed to click the "Review Documents" button at the bottom of the email. This will take you to esign.heffron.com.au so you can review and sign your documents.

If you have any questions about these documents or your access code, please contact Heffron's Client relations team on 1300 433 376 or clientsupport@heffron.com.au.

Kind regards,

Heffron Consulting

Heffron SMSF Services
fundadmin.docusign@heffron.com.au

[Review documents](#)

Button not working? Paste the following link into your browser: <https://esign.heffron.com.au/session?id=b35383dde0684341bec0caa342bccc04&key=0f341d5bb135402fa3fa3527b2f31423>

Once in Annature

1. The first thing you will be asked to do in Annature is to enter your password to unlock your documents. Heffron have added authentication to increase the security of your documents. You will have received a password hint in your original email.

Password required

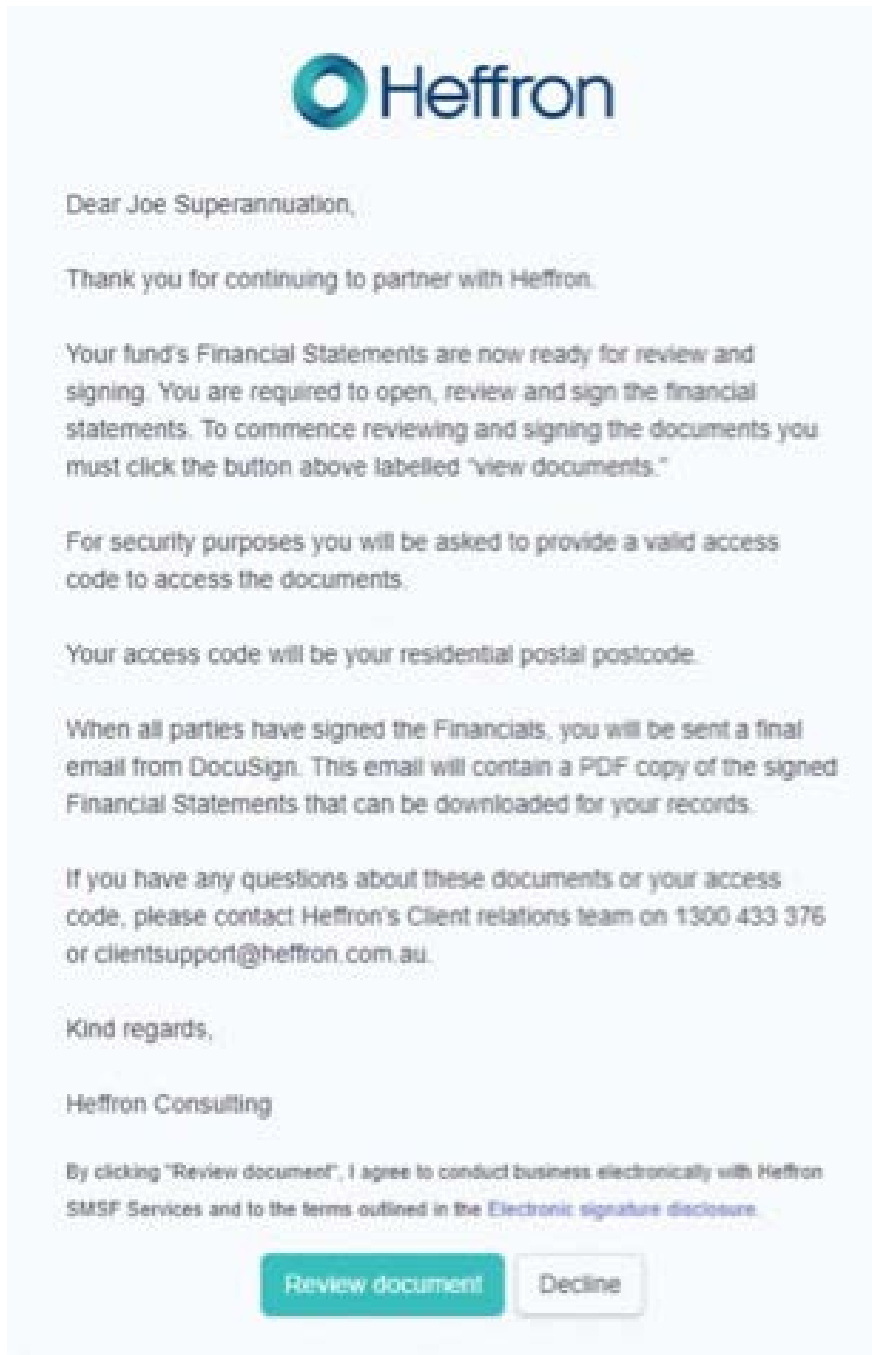
The sender has requested you enter a password prior to accessing the documents.


If you have not received a password, please contact the sender.

Password

[Proceed](#)

2. Once you have entered your password you will be taken to the signing session. You will be prompted to click "review documents" or "decline". Above these buttons is the message "By clicking review documents, I agree to conduct business electronically with Heffron SMSF Services under the terms outlined in the Electronic Signature disclosure. If you wish to read the Electronic Signature disclosure, simply click on the words.





Dear Joe Superannuation,

Thank you for continuing to partner with Heffron.

Your fund's Financial Statements are now ready for review and signing. You are required to open, review and sign the financial statements. To commence reviewing and signing the documents you must click the button above labelled "view documents."

For security purposes you will be asked to provide a valid access code to access the documents.

Your access code will be your residential postal postcode.

When all parties have signed the Financials, you will be sent a final email from DocuSign. This email will contain a PDF copy of the signed Financial Statements that can be downloaded for your records.

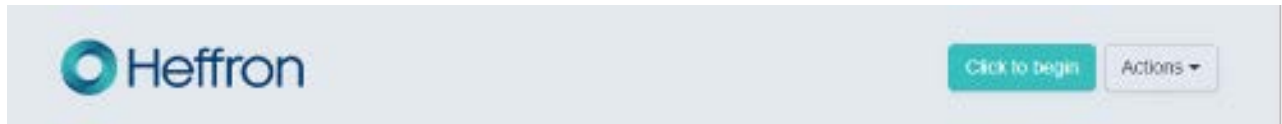
If you have any questions about these documents or your access code, please contact Heffron's Client relations team on 1300 433 376 or clientsupport@heffron.com.au.

Kind regards,

Heffron Consulting

By clicking "Review documents", I agree to conduct business electronically with Heffron SMSF Services and to the terms outlined in the [Electronic signature disclosure](#).

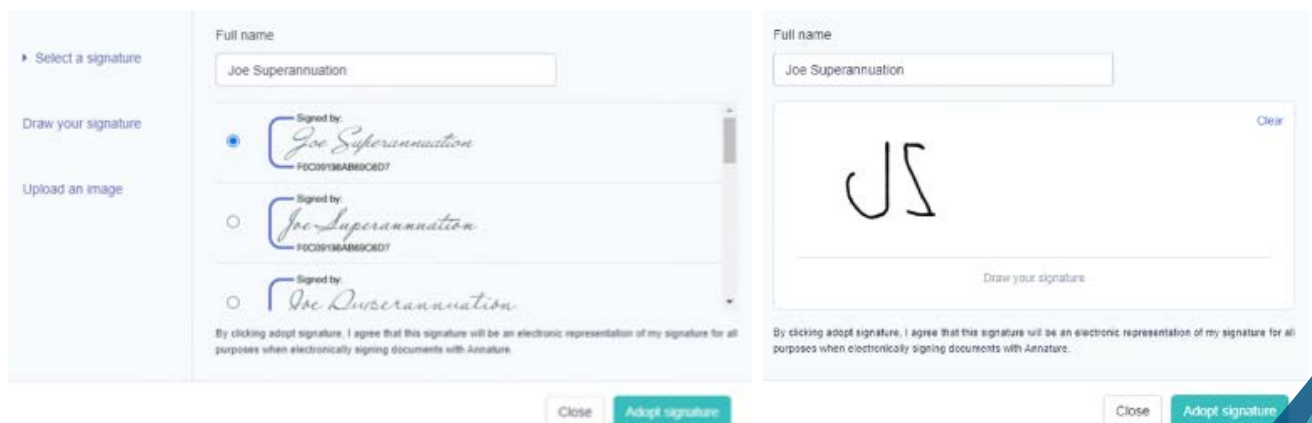
3. Click "Review document" to begin reviewing your documents.
4. You can now scroll through and review all pages in your document. If you notice any errors or have any questions, you should contact your adviser or Heffron as soon as possible and not proceed with signing the documents.
5. Once you are satisfied with the documents, click the "Click to begin" button on the top right hand side of the page. This will direct you to your first signing spot.

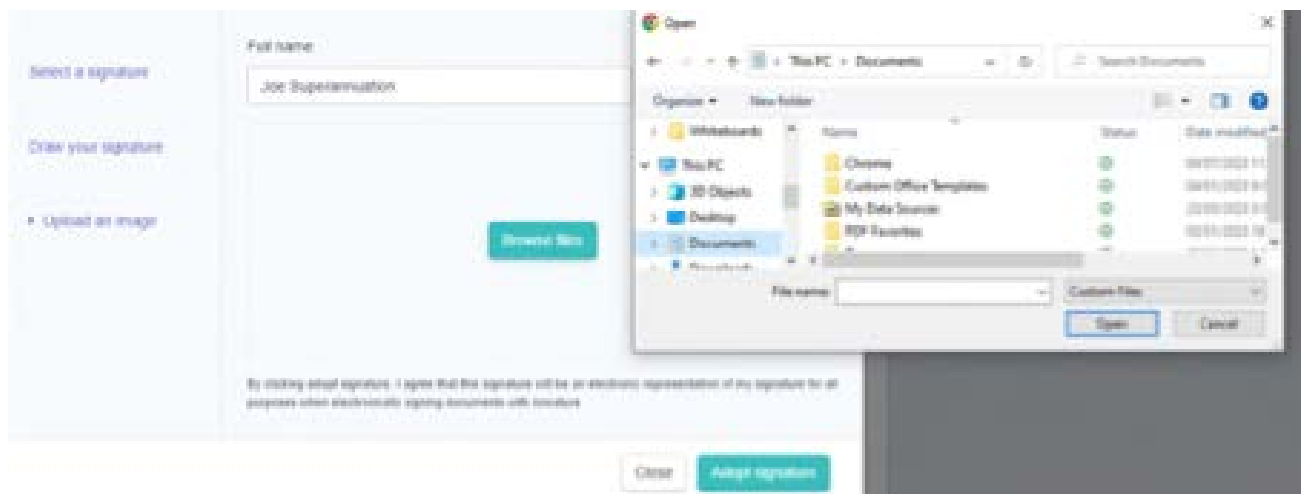


6. Click the "Sign" button. This will prompt you to create your electronic signature.



7. You can choose your electronic signature by:
 - a. "Select style" - accepting the default electronic signature Annature creates for you.
 - b. "Draw" your own signature - if you'd like to draw your own signature, we suggest using a mobile or tablet device as these are easier to draw on.
 - c. "Upload" a signature - if you have an image of your signature saved on your computer you can upload and adopt that as your Annature electronic signature.





8. Once you're happy with your signature, click "Adopt and sign"
9. Once you've adopted a signature and signed in your first signing location, you will automatically be directed to your next signing spot.
10. Click "Sign", your chosen signature will be applied, and you will be directed to your next signing spot.
11. Continue this until you've completed all your signing spots.
12. Once you have completed all you signing spots you will directed to the top of the documents and prompted to click "Finish signing"



13. Once you have clicked "Finish Signing" the sender will be notified and you can close the browser. Once all parties have completed the signing you will receive an email with your completed documents.

