

HSBC LiveSign

Customer Guide

February 2021



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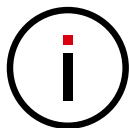
Welcome to HSBC LiveSign

As an HSBC customer, we want to let you know about the benefits of using electronic signatures to sign documents that we may send to you.

With HSBC LiveSign, you can securely sign and return documents online, without having to download any new software or sign up for a new account.

HSBC LiveSign records each step of the document process in an audit trail, which is produced and distributed, along with a secure copy of the signed document, to all relevant parties once the document is complete.

This user guide will explain the benefits of using electronic signatures and how HSBC LiveSign works, and answer any questions you may have. If you have any additional queries, please contact your relationship or case/ client manager.



Your relationship or case/ client manager will confirm that you agree to use HSBC LiveSign to electronically sign documents before we ask you to sign anything using HSBC LiveSign. If you prefer to use physical signatures on paper instead, you can reach to your relationship or case/ client manager.

Any email communications on HSBC LiveSign will be sent from the address **echosign@echosign.com**.

If you have any phishing concerns, please don't hesitate to contact your relationship or case/ client manager.

Step-by-step process

Accessing HSBC LiveSign

1. Once you've agreed to sign documents electronically, you'll receive an email from us with the subject line:

“Signature requested on [Document Name]”

If you haven't received the email within the advised timeframe, please check your 'Junk' folder. You can add the sender's email address to your 'Safe Senders' list to stop any future emails being filed in the 'Junk' folder. How you do this varies on the email provider, but for Outlook, select **'Home > Junk > Junk Email Options'** and then select the **'Safe Senders'** tab and **[Add]** the email address.

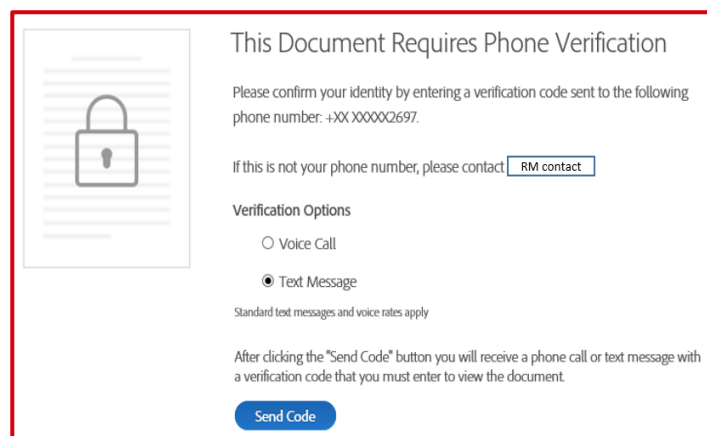
Note: For security reasons we will use TLS (Transport Layer Security) to send LiveSign emails to you. Please make sure your email service has this enabled in order to receive our email.

2. Our email will include instructions on what you're being asked to do. Please read these details carefully. You can access the document by clicking the **'Review and sign'** button link within the email.

Note: You can only access your documents through the link in the email.

3. You'll receive a message prompting you to use two factor authentication to confirm your identity before accessing your document. We'll use the phone number we have on file for you, and you can generate a verification code via a **voice call or text message**. Alternatively, if you do not have a phone number where the bank can reach you, a password can be generated for you which our Relationship or Case/ Client Manager will get in touch to provide.

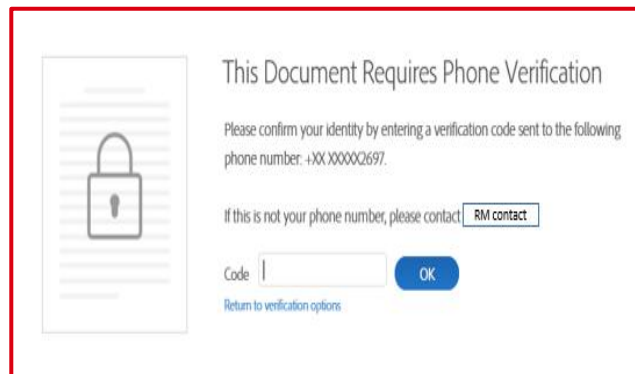
Screenshot:



4. Selecting **Voice Call** will raise a call to you and a verification code will be dictated to you. Selecting **Text Message** will send a verification code in a text message.

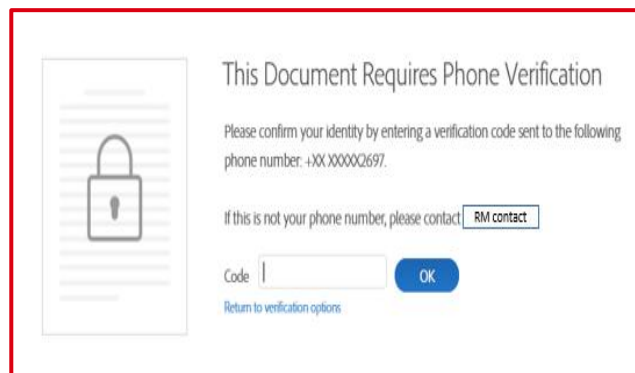
The verification code generated needs to be input on the screen shown below.

Screenshot:



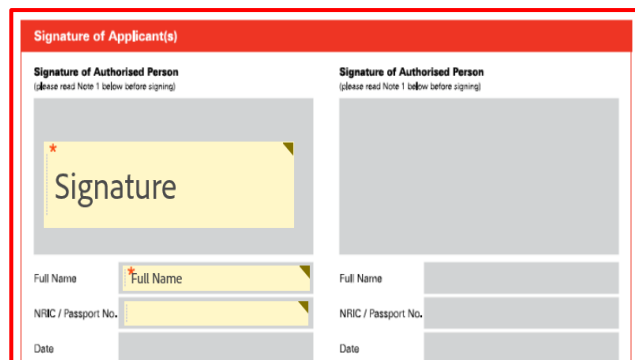
5. If a password is selected as the authentication method. The password screen opens in a browser window. **Please enter the password** provided to you by your Relationship or Case / Client Manager over the phone or through email and **click OK**.

Screenshot:



6. The document opens in a browser window with the required fields highlighted.

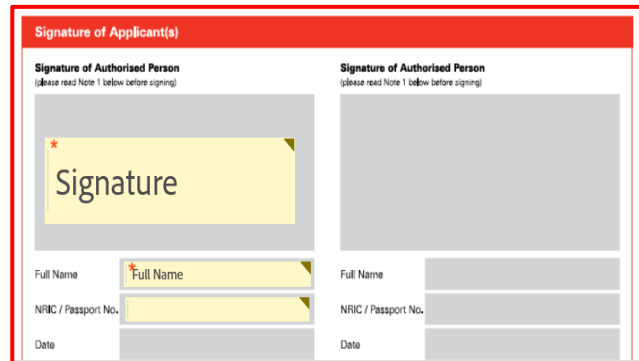
Screenshot:



Adding an electronic signature

7. The document opens in a browser window with the required fields highlighted. Follow the instructions on the location you will need to input your electronic signature.

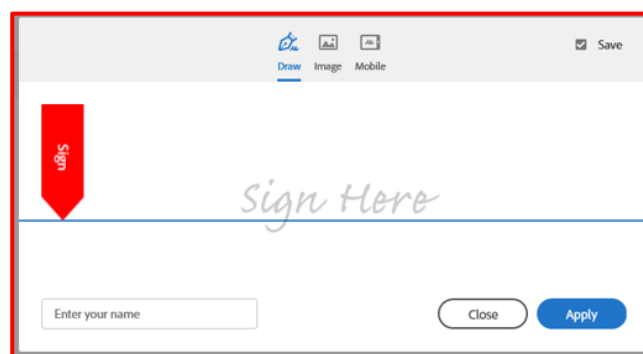
Screenshot:



8. You can sign the document using the following signature options:

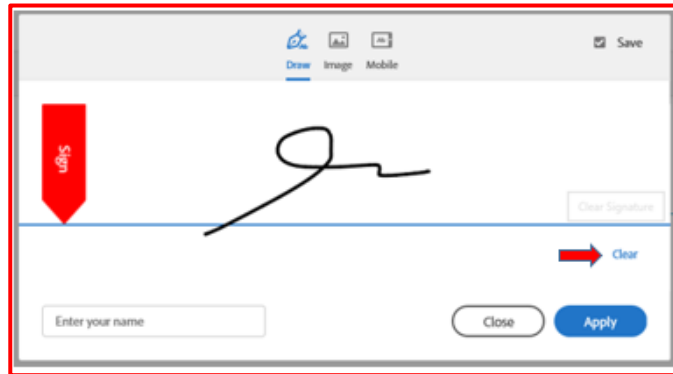
- ◆ **Draw** – Allows you to draw your signature using your computer mouse or stylus.
- ◆ **Inserting an image** - Upload an existing signature image from your device.
- ◆ **Mobile** – Allows you to use a mobile device to easily draw or capture your signature through a link sent to your mobile – **RECOMMENDED**

Screenshot:



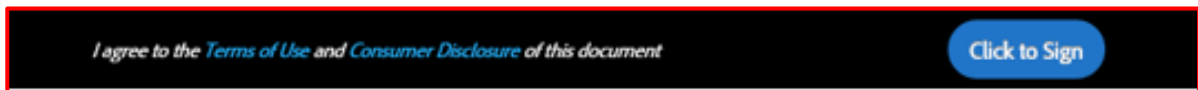
For drawing or using a mobile for your signature, use a mouse or stylus and then select **'Apply'** to place your signature in the signature field and return the document.

Screenshot:



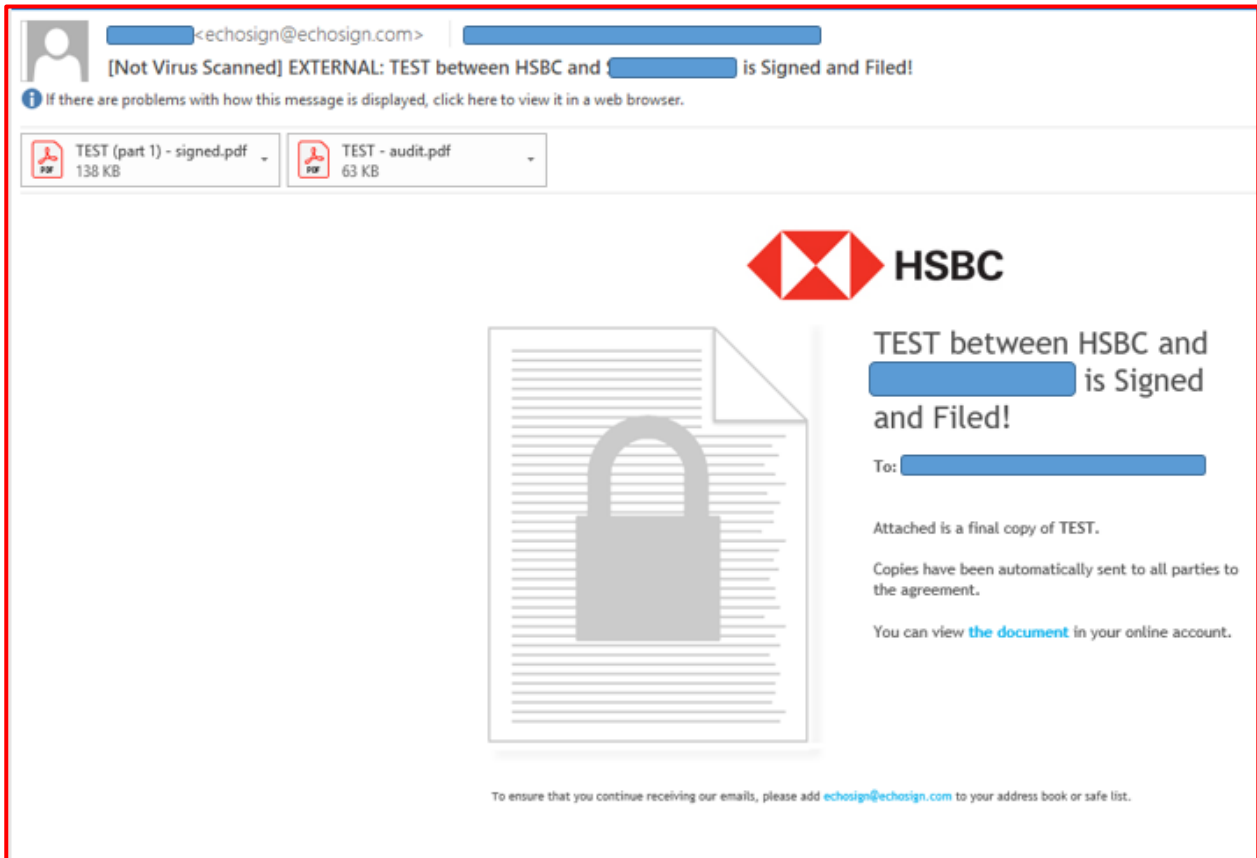
If you want, you can change your signature by clicking 'Clear' under the current signature and re-drawing.

9. Once the document is signed, the Adobe Terms of Use and Consumer Disclosure message is displayed at the bottom of your browser window in the screenshot below. Please review the Adobe Terms of Use and Consumer Disclosure carefully.



10. When all of the required fields are complete, and you are agreeable to the Adobe Terms of Use and Consumer Disclosure, select the 'Click to Sign' button at the bottom of the window to agree.

11. Once the document has been completed and signed, you'll receive an email with the final document and an audit trail of the process.



Frequently Asked Questions

What is HSBC LiveSign?

HSBC LiveSign is an automated electronic signature workflow to replace paper and ink signatures using the Adobe platform. The cloud-based document solution makes it easy to sign documents on a computer or mobile device, and once complete, the Adobe system will email you the signed copy as well as an audit trail for your records.

How do I use HSBC LiveSign?

HSBC LiveSign lets you work using a computer or mobile device to receive documentation, sign and send through email. There's no need to download any software or create an Adobe account. The document to be signed is sent directly to your email account as a basic form of authentication.

What's an Electronic Signature?

An electronic signature, or e-signature, is a way of signing documents electronically. Electronic signatures have certain advantages including the following three key items:

Opt-in – Your relationship or case/ client manager will confirm that you're happy to use HSBC LiveSign to electronically sign your documents.

Signer authentication – Any documents that need your signature will be sent to your registered email address and a two factor authentication which could either be a one-time password (OTP) or a secondary password will always be required for eSigning. Once you initiate the eSigning process, please follow the instructions on the Adobe screen and we'll send a one-time password (OTP) to your registered mobile phone for you to complete the eSigning process. For password authentication, the relationship or case/client manager will call you instead to provide the password.

Final proof – Once the document has been completed and signed, you will be able to see the copy that you have electronically signed. Final copies of the documents will be automatically sent to all parties via email.

I'm having problems with my two factor authentication – what should I do?

Please contact your relationship or case/ client manager, they'll be able to help resolve any problems with HSBC LiveSign.

I'm getting an error message when I click the link – what should I do?

Please ensure you sign out and close any existing Adobe LiveSign windows that may be open before trying to access the link again. If the problem persists, please contact your relationship or case/ client manager.

How do I provide confirmation to use Live Sign?

For first time users only, you will need to inform the relationship manager to use HSBC Live Sign. An email would be sent to you to expect an email from Adobe Sign ahead of any Live Sign transaction either by the relationship manager or case/ client manager.

What if I want to delegate the document to another signer but I need to review the agreement beforehand?

Please inform your relationship or case/client manager, they will ensure that the recipient role is enabled so that the document can be delegated.

What are the benefits of using HSBC LiveSign?

HSBC LiveSign makes signing documents quick and simple. You can sign without printing or faxing documents, installing software, creating new logins, or scanning. The entire process takes minutes to complete and can be done from anywhere, at any time, with any device connected to the internet.

We always ensure your documents, data, and personal information are protected by industry-standard security practices, and HSBC LiveSign is no different. Both HSBC LiveSign and Adobe Sign safeguard identity management, data confidentiality and document integrity with secure software and service operation processes.

HSBC Live Sign supported by Adobe Sign is certified compliant with ISO 27001, SOC 2 Type 2 and PCI DSS. To learn more, please visit the [**Adobe Sign Trust Centre**](#).

Will I still receive a paper version of the document for my records?

No – once the electronic signing process has been completed, LiveSign will automatically email you a Portable Document Format (PDF) version of the signed documents for you to save or print. You may choose to print from your end if you wish to save a copy of the paper version.

Do I need to send you a paper copy of the document?

No, the Adobe system provides us with a Portable Document Format (PDF) copy of the signed document which we'll process and store as we normally would with a paper version.

Is HSBC LiveSign required or can I use the traditional paper version?

Your Relationship or case/ client Manager will ask you during the process if you're happy to receive and sign the document electronically. Once you've agreed to use electronic signatures, the document link will be sent to you to commence the signing process. However, if you want to opt out of signing electronically at any stage in the process, please let your Relationship or case/ client Manager know. We'll happily send you a traditional paper version to sign instead.

I prefer pen and paper – do I have to use HSBC LiveSign?

It's your choice whether or not you wish to use electronic signatures with HSBC LiveSign. When it comes to document signatures, your relationship or case/ client manager will ask you if you're happy to receive and sign the document electronically. If you agree, we'll send you a document link for you to sign online. If you don't agree, we'll continue to send the traditional paper version for you to sign. If you initially agree to using HSBC LiveSign and then decide you want to opt out, just let your relationship or case/client manager know and we'll revert back to paper documents.



Together we thrive

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