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## Focus on members not paperwork.

Excellent service is what draws – and keeps – credit union members. But if you're still operating with costly, error-prone, paper-based processes, you may be losing more than your members. Improvements to your credit union's digital banking experience can pay dividends, reinvigorate member engagement, and be implemented quickly. DocuSign can digitize new account, lending, and disclosure agreements, making it easy for you to deliver a world-class member experience.

### Extend your reach.

Effectively eliminate one of the greatest barriers to entry for members: branch proximity. With mobile apps and online services, members can manage everyday banking needs and build closer relationships with their credit union.

### Streamline workflow and improve productivity.

Reduce the amount of time your employees spend on tedious tasks – like handling documents, re-keying data, and manually verifying member ID – and empower them to focus on providing more profitable, value-added services, resulting in higher employee satisfaction and retention.

### Accelerate lending times.

Streamline the lending process, be it mortgages or car loans. By decreasing the steps and resources related to manual application processes, you can assemble, send, and sign faster; reduce time to close; and get paid faster with eNotes that are GSE approved for sale in the secondary market.

### Enhance security and simplify compliance.

Maintain a digital audit trail of all agreements, a complete, time-stamped history of every send, view, print, sign, or decline action. A tamper-evident, court-admissible Certificate of Completion ensures you can comply with most prominent regulations like KYC/AML.

### Minimize IT costs and enhance time to value.

Implement solutions to digitize your agreement processes within weeks and not months. Pre-built connectors and easy-to-use open APIs allow you to simply plug into existing core solutions, like Finastra and Salesforce, further automating document generation and sharing processes.

## 10 of the top 15

global financial services  
firms rely on DocuSign

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## Results

### More than 50% shorter

auto loan application-  
to-funding time  
Firstmark Credit Union

### 95% decrease

in loan processing time  
from over an hour to  
just five minutes  
Arizona Federal Credit Union

### Nearly \$300,000 in savings

the first year and increased  
member satisfaction  
Alliant Credit Union

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**“Cell phones are the  
branch bank in your pocket.  
We need to be able to  
provide everything to  
our members via mobile.  
DocuSign easily provides  
that solution for us.”**

**Jesus Islas**  
Arizona Federal Credit Union  
Digital Banking Manager

## The DocuSign Agreement Cloud for Financial Services

In financial services, agreements are fundamental to the customer moments that matter, like opening an account, securing a loan, or transferring wealth. Asking customers to view tiny PDF forms on a mobile device is the opposite of a modern signing experience. The DocuSign Agreement Cloud integrates seamlessly into existing processes, allowing you to create a fast, frictionless agreement experience that increases conversion and customer satisfaction while maintaining security and compliance.

### eSignature

Securely send and sign loan applications and disclosures electronically and maintain a complete audit trail.

### Guided Forms powered by Intelledox

Turn complicated forms into intuitive “wizard-style” interviews to capture borrower information.

### Identify

Choose from a suite of proven authentication and ID verification options to secure access to an agreement.

### Rooms for Mortgage

Accelerate closing times and improve the borrower experience with a secure, digital workspace for everyone involved in a mortgage, including external participants like title and settlement.

### eNotary

Allow notaries to electronically witness and authenticate the execution of agreements.

### eNote and Asset Vaulting by eOriginal

Maintain an authoritative electronic copy of the promissory note, including any transfers of ownership control.

### Integrations

Easily embed DocuSign into the platforms where mortgage work is done with 350+ pre-built integrations, like Notarize, eOriginal, Liveoak, Blend, Roostify, and many more.

To learn more, go to [docusign.com/financial-services](https://docusign.com/financial-services)

## Use case examples

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### Account opening

- Checking/savings accounts
- Signature cards
- Proof of identity
- Consent forms
- KYC

### Lending

- Loan/mortgage applications
- eConsent
- Loan estimate/waiver
- Broker contracts
- Underwriting documents

### Customer service

- Terms of use
- W-8/W-9
- Address/beneficiary changes
- Transaction disputes

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#### About DocuSign

DocuSign helps organizations connect and automate how they prepare, sign, act on, and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature: the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, more than 500,000 customers and hundreds of millions of users in over 180 countries use DocuSign to accelerate the process of doing business and to simplify people's lives.

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