

eForms User Guide - Shareholders

When the shareholder is ready to fill out an eForm they will first click on the form URL to start the process. Shareholder forms can be located on Shareholder.Primerica.com, and the shareholder will click the link for the needed form. The shareholder will need to click **CONTINUE** in order to accept the terms of service and open the form up:

SECTION 2 – DISTRIBUTION METHOD

Please indicate how you wish the distribution amount to be sent to you:

2.1 - Mail Check
We will process and mail your distribution check usually within two to three business days.

- To the address of Registration – To have the check sent to the address and registration of record.
- To an alternative address Payee/address – To have the check sent to alternate payee and / or address.

2.2 – Express Mail

By clicking continue, I acknowledge that I have read and agree to the Adobe [Terms of Use](#). See our [Privacy Policy](#) for details on our privacy practices.

Continue

The shareholder will now be able to start filling in information on the form in the same way they would other fillable PDFs:

Primerica Shareholder Services **IRA DISTRIBUTION DISCLOSURE FORM**

REQUIRED INFORMATION: Please complete all information to avoid any delay in processing your request.

Account Owner: John Doe Account Number: 123456789

1 DISTRIBUTION AMOUNT

I / We would like to receive: (choose one)

Fund Number	Number (#) of Shares	Dollar amount (\$)	Continue Draft
ABCDE		\$ 5000	<input type="checkbox"/>
		\$	
		\$	

☐ All Shares in All Fund Positions

2 DISTRIBUTION METHOD

2.1 Mail Check
Please mail the check to: (choose one) ☒ The address of registration ☐ To an alternate payee/address

Name(s): _____

Full Address: _____

2.2 Express Mail ☐ **2.3 Wire Transfer** ☐ **2.4 ACH Transfer** ☐

I / We would like to receive a check: (choose one) ☒ 1st Class Mail ☐ Next Day Air (Read note regarding fee on instruction page)

I / We would like to receive a wire transfer: (choose one) ☐ To the active bank of record at PSS ☐ To an alternate bank account

I / We would like to receive a ACH transfer: (choose one) ☐ To the active bank of record at PSS ☐ To an alternate bank account

Daytime Phone Number: _____

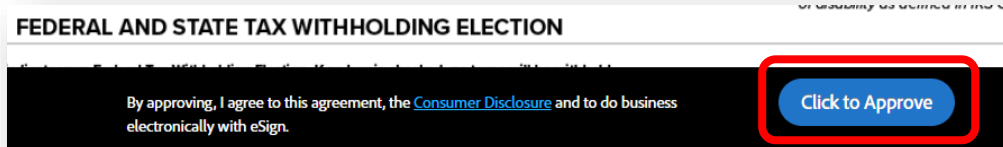
For some forms there might be the need for additional information or documents such as a voided check or birth certificate. This process allows for document uploads using the following:

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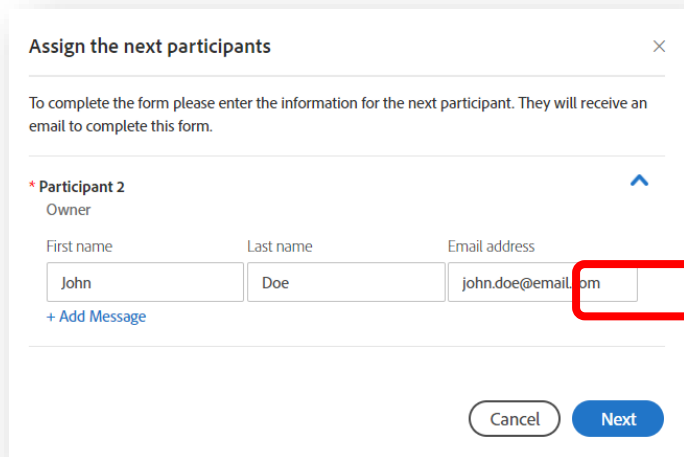
NOTE: Not all eForms will require additional documents to be uploaded.

Once all of the required information has been entered on the form the shareholder will then be prompted to approve the form in order to move forward to the signature process:



The shareholder will then be presented with two screens where they will enter and confirm their name and email address:

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Assign the next participants [X]

To complete the form please enter the information for the next participant. They will receive an email to complete this form.

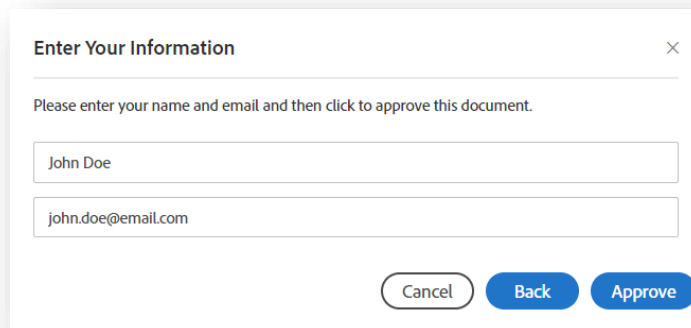
*** Participant 2** [Up Arrow]

Owner

First name	Last name	Email address
John	Doe	john.doe@email.com

[+ Add Message](#)

[Cancel] [Next]



Enter Your Information [X]

Please enter your name and email and then click to approve this document.

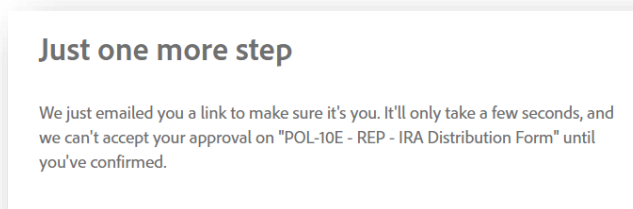
John Doe

john.doe@email.com

[Cancel] [Back] [Approve]

NOTE: The shareholder will need to provide their name and email address twice. This ensures that the correct information is provided for security purposes as email verification is part of the eForms submission process.

Once the shareholder hits **APPROVE** they will be directed to a webpage confirming that the form has been completed in terms of data entry, and directed to check their email for the next step of the eForms submission process:

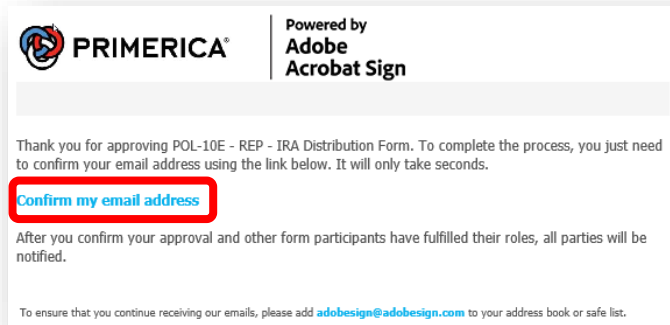


Just one more step

We just emailed you a link to make sure it's you. It'll only take a few seconds, and we can't accept your approval on "POL-10E - REP - IRA Distribution Form" until you've confirmed.

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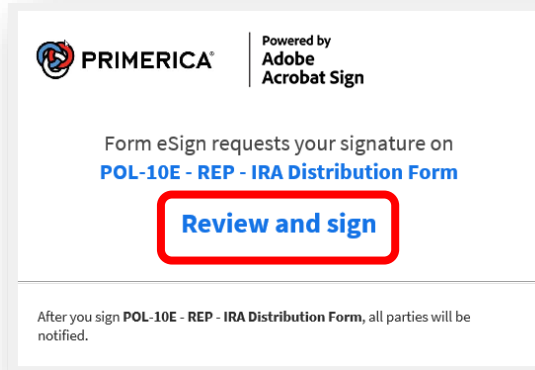
The shareholder will then need to go to their email to click the **CONFIRM MY EMAIL ADDRESS** option:



The following will then display confirming the email address used:

Your approval of POL-10E - REP - IRA Distribution Form has been verified. It has now been emailed to the additional signer(s) for their signature.

After confirmation of the email address is done, the shareholder will receive an email with a link to complete the eForms process:

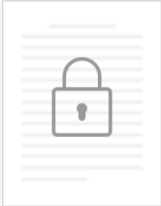


Clicking on the link will open up a browser window that begins the Knowledge Based Authentication (KBA) process. This is a security measure that requires the shareholder to complete 3 questions tied solely to them. Up to 2 questions can be missed (with additional questions totaling up to a possible 5) before the process stops if answers are incorrect.

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NOTE: The first and last name in the KBA are locked in and cannot be changed at this point. The names entered during form entry are what cannot be altered, and only the address and Social Security Number are free form at this point in time. If an incorrect name was entered during the first part of this process then a new form would need to be opened and completed in order to move forward.

Please sign: POL-10E - IRA Distribution Form
Your signed form will be sent to Form eSign



This Document Requires Identity Verification

After clicking "OK" below you will be presented with a list of questions designed to validate your identity.

First Name: John Last Name: Doe
Home Address: 123 Main St.
City: Duluth State: Georgia Zip: 30099 Last 4 digits of your SSN: 1234

☒ I agree to provide my personal information in order to validate my identity ([Privacy policy](#))

OK

Powered by Adobe Acrobat Sign

Next, the shareholder will once again click **CONTINUE** in order to proceed:

By clicking continue, I acknowledge that I have read and agree to the Adobe [Terms of Use](#). See our [Privacy Policy](#) for details on our privacy practices.

Continue

At this point the shareholder can view the form they completed in the first part of the process, but the information included is now locked and cannot be changed. This allows the shareholder to provide a final review before submitting to ensure all information is correct:

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Primerica Shareholder Services | IRA DISTRIBUTION DISCLOSURE FORM

REQUIRED INFORMATION: Please complete all information to avoid any delay in processing your request.

Account Owner: John Doe | Account Number: 123456789

1 DISTRIBUTION AMOUNT

I / We would like to receive: (choose one)

Fund Number	Number (#) of Shares	<input checked="" type="radio"/> Dollar amount (\$)	Continue Draft
ABCDE		\$ 5000	
		\$	
		\$	

After review of the form the shareholder can not provide their final signature on the form in order to complete the process and submit their request:

5 ELECTRONIC SIGNATURE (Please read instructions on page 2)

By signing this form, I acknowledge that I have read and accepted the terms outlined in the IRA without alteration with the name in the account's registration.

Start Click here to sign

Account Owner's Signature

POI-10E - REP - IRA Distribution Form

Type Draw Image Mobile

Sign

John Doe

Clear

Close Apply

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The final step is to click the option **CLICK TO SIGN** in order to submit the eForm:

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By signing, I agree to this agreement, the [Consumer Disclosure](#) and to do business electronically with eSign.

[Click to Sign](#)

The browser will then direct the shareholder to a confirmation page showing that the form has been completed and submitted, as well as providing a link to view or download the form:



You're all set

You finished signing "POL-10E - REP - IRA Distribution Form".

All parties will be notified via email. You can also [download a copy](#) of what you just signed.

The shareholder will now receive 2 confirmation emails. The first confirms completing of the form being signed and submitted, and the second with the shareholder's name also provided as confirmation. Both emails also contain a link to view the completed form:



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You're done signing
POL-10E - REP - IRA Distribution Form

[Open agreement](#)

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Acrobat Sign



John Doe completed
POL-10E - REP - IRA Distribution Form

[Open agreement](#)

The agreement is completed between:

- eSign
- John Doe

You can [open the final agreement](#) to review its activity history or download a copy for reference.