

## **Adoption Agreement – Initial Form Completion Instructions**

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1. Click on the following link: [3220 Pre-82 Adoption Agreement](#)
2. Fields that are prefaced by a Red Asterisk (\*) are required fields.
3. In both Sections 2 – Part B (Pension Rate) and 3 – Part B (Contingent Annuitant Percentage), if you populate a row of the table, the second field in that row becomes required.
  - a. To eliminate this, just delete the text in the row.
4. In Section 6 – Adoption:
  - a. Title field will auto adjust.
  - b. When you click on the "Signature field," a new dialog box will display where you will have the following options to sign:
    - i. Type: Via keyboard, type your name and choose a format
    - ii. Draw: Via your mouse (or via touchscreen if you are using a touchscreen computer, tablet or touchscreen phone)
5. There is a "Comments" box field on page 3 of the form to enter any additional information you wish to communicate.
6. Once you have completed all required fields, a new button will display at the bottom of the form asking you to "Click to Sign" and enter your email address.
7. You will then receive an email from Adobe Sign asking you to verify your email address.
  - a. Click on the "Confirm my email address" link in the email.
  - b. If you do not complete this step, the form will not be submitted.
8. You are done.

### **Post Signature Form Process**

Once all Wespath internal reviews are completed and signatures have been applied, you will receive an email with a PDF attachment showing the completed form with all information/signatures.

- Please download and save for your internal records.

### **Wespath Rejection of Form**

If the form is not completed correctly, Wespath will "Decline to Sign" the form and specify a reason. You will receive an email (to your email address which you entered in Step 6 above) relaying that Wespath declined to sign and display the reason.

The previously submitted form cannot be fixed so a new form must be completed. Please start again with Step 1 in the **Initial Form Completion Instructions** section and when completing the form, make sure that the information that was incorrect in the previous submission is corrected.

If you have any questions, please reach out to your Wespath Client Services Manager.