

YOUR PRACTICE, CONNECTED

Advium DocuSign Connector

Your advice workspace.
Your client signing journey.



ADVICE WORKSPACE

DOCUSIGN

PREPARE / SIGN / TRACK / RETAIN

KEEP THE CLIENT JOURNEY TOGETHER

A clearer path from review to signature.

YOUR GUIDE TO THE CONNECTION

A connected client journey.

A practical introduction to the workflow, your choices and the steps your team still reviews.

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ABOUT THIS GUIDE

This guide describes a development preview using a DocuSign sandbox. It does not announce a generally available production connector.

01 / PLANNED SIGNING WORKFLOW

Prepare the document. Keep the client in view.

The planned workflow starts in Advium: choose the document, add the people who need to sign and prepare the signing fields.

Client document

Document

Advice acceptance.pdf

Recipients

Client and adviser

Fields

Signature · name · date

01

Set recipients and signing order.

02

Review the document before sending.

IN PRACTICE

Prepare then review then send.

Illustrative development workflow. Confirm your firm's enabled capabilities before rollout.

02 / PLANNED SIGNING WORKFLOW

A familiar place to take the next step.

Bring DocuSign signing into the Advium client portal, so clients can move from reviewing their documents to signing them.

Your documents

Review

Open the document in the portal

Sign

Continue to DocuSign signing

Return

Come back to the client portal

01

Portal, email or both delivery options.

02

DocuSign handles the signing experience.

IN PRACTICE

Advium client portal + DocuSign.

Illustrative planned client journey. Confirm your firm's enabled capabilities before rollout.

03 / PLANNED SIGNING WORKFLOW

Know where it stands. Keep the signed record.

The development workflow tracks the signing request and retrieves the completed document and certificate once completion is verified.

Signing request

Prepare

Confirm the document and recipients

Track

Follow the request's progress

Retain

Signed PDF + certificate

01

See progress alongside the client's work.

02

Keep the signed PDF and completion certificate.

IN PRACTICE

Completion is checked before files are made available.

Illustrative development workflow. Confirm your firm's enabled capabilities before rollout.

YOUR FIRM, YOUR CHOICES

Start with the right access.

Connect only the capabilities your team needs, then walk through one client workflow together.

01

Confirm the preview

Ask Advium to demonstrate the sandbox workflow. Confirm production readiness, provider access and firm eligibility before any live rollout.

02

Prepare your team

Agree who prepares documents, who checks recipients and who can send signing requests. Configure client portal access for the intended recipients.

03

Test the journey

Use an agreed sandbox example to prepare fields, review the request and walk through the intended signing route.

04

Check the completed record

Confirm how signing progress, the signed PDF and the completion certificate appear once completion is verified.

LET'S MAKE IT WORK FOR YOUR FIRM

See your workflow in Advium.

Can our firm use this today?

This is a development preview, not a generally available production connector. Ask Advium to show the sandbox workflow and confirm rollout plans for your firm.

Will clients sign within the Advium portal?

That is the workflow being built: launch the DocuSign signing experience from the client portal and return after signing. Portal access and the firm's configuration must be in place.

What will be kept after signing?

The development workflow retrieves a signed PDF and completion certificate after verified completion. Confirm the final rollout behaviour with Advium before using it for client documents.

**Bring your team.
Explore the connection.**

advium.ai/book-demo

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