

How to Complete and eSign a fillable PDF form

Note: These instructions are intended for desktop and laptop users only.

Step 1:

Select the fillable form from the Plan Administrators Resources page

📰 Plan Administrator Resources	
Looking for a Form or Document?	
If you administer an RBC Insurance Group Benefit Solutions plan you can also access resources by <u>sit</u> Solutions website.	g <u>ning</u> in to the Online Group Benefit
Select a category	
Service Forms	~
Select your form or document	
Beneficiary Designation Form	~
Form/document instructions	
> Beneficiary Designation Form 👼	

The integrity of the client information is kept intact when using Adobe, available here for free.

Step 2:

Save the file to your computer by selecting "**File**" menu, and choosing "**Save As**" from the drop down option.



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Step 3:

Retrieve the saved copy from your computer and Select the **arrow** to open the **"Edit panel**" to begin completing your form.



Please note if you have "**Chrome's built-in PDF viewer**" you cannot sign using Chrome. To use the sign functionality launch Adobe Acrobat Reader and open the application from there to enable the functionality above.

Step 4: Select the "**Fill & Sign**" option and begin completing your document.



Step 5: To fill out the required fields, you can **click** on each box to type or select the required information.

Beneficiary Designation					
	SECTION 1 – GE	NERAL ENROLMEN	T INFORMATION		
By completing this form, you are asking RBC Life Insurance	Name of Employer ABC C	ompany			
information you previously	RBC Policy Number		Billing Division Number		
provided.	Employee Name Doe		John	A	
Any previous beneficiary designation or trustee		Last Name	First Name	Middle Initial	
appointment is revoked.	Plan Member ID Number				

Step 6:

Once you are ready to eSign, Click "Sign" to activate the signature functionality



Step 7:

Click "Add Signature" and allow your client to eSign 1st, once they complete all their signatures, you can create your own and insert in the Advisor sections.

歲 Sign	
Add Signature 🛛 🕄	
Add Initials 🛛 😏	•

Step 9:

Draw your signature using a mouse and click "Apply"

Type Draw Image TOM

Step 11:

To add it again in the document click "Sign" and select the signature



Step 8:

Please note all signatures must be "Drawn" in order to be accepted as a legal binding signature. Please do not use the "Type" option to create signatures.

Type	ঠ ় Draw	I mage



Place the signatures in the document by dragging and releasing your mouse.

Proposed Insured (Signature)	∧ A 🗊
	JOHNDR

Step 12:

Once the form is completed, save the completed form to your machine.



Important Note: Once signatures have been added to the fillable form, you can no longer modify or edit the document.