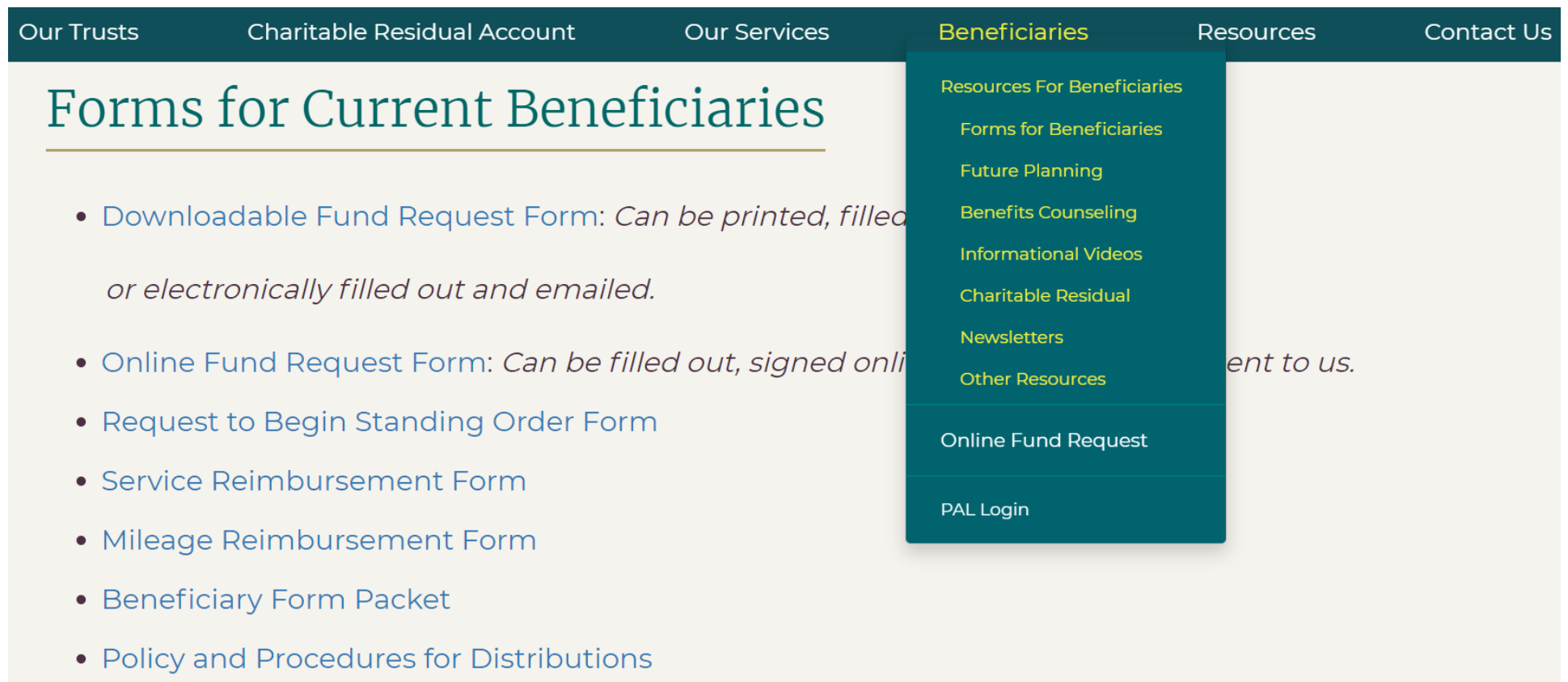


Online Fund Request Instructions

Achieva Family Trust now offers a way to submit your fund requests online through our website. This simple process is detailed below in this brief overview of the process.

First, go to our online fund request form. You can find it on our website, AchievaFamilyTrust.org by clicking on “Beneficiaries” then “Online Fund Request” as seen below:



The screenshot shows the website's navigation bar with the following items: Our Trusts, Charitable Residual Account, Our Services, Beneficiaries (highlighted), Resources, and Contact Us. Below the navigation bar, the page title is "Forms for Current Beneficiaries". A list of forms is displayed, including "Downloadable Fund Request Form", "Online Fund Request Form", "Request to Begin Standing Order Form", "Service Reimbursement Form", "Mileage Reimbursement Form", "Beneficiary Form Packet", and "Policy and Procedures for Distributions". A dropdown menu is open under "Beneficiaries", listing "Resources For Beneficiaries" (with sub-items: Forms for Beneficiaries, Future Planning, Benefits Counseling, Informational Videos, Charitable Residual, Newsletters, Other Resources), "Online Fund Request", and "PAL Login".

Our Trusts Charitable Residual Account Our Services **Beneficiaries** Resources Contact Us

Forms for Current Beneficiaries

- Downloadable Fund Request Form: *Can be printed, filled out or electronically filled out and emailed.*
- Online Fund Request Form: *Can be filled out, signed online and submitted to us.*
- Request to Begin Standing Order Form
- Service Reimbursement Form
- Mileage Reimbursement Form
- Beneficiary Form Packet
- Policy and Procedures for Distributions

Resources For Beneficiaries

- Forms for Beneficiaries
- Future Planning
- Benefits Counseling
- Informational Videos
- Charitable Residual
- Newsletters
- Other Resources

Online Fund Request

PAL Login

Once you complete all the necessary information on the fund request form, hit the “**Submit your form**” button at the bottom of the fund request form page.

Submitted By:

Relationship to Beneficiary:

Phone:

Email:

Attach files here:

No file chosen

No file chosen

No file chosen

(End of Form)

You will receive an email at the *email address you entered in the form* asking you to sign the form similar to the one below:

Your documents are ready to review: Achieva Family Trust Form Signing

Treeno Demo 2 Online Signatures noreply@signixmail.com via mail.signix.biz

to me ▼

Dear Achieva Trust,

Please sign the following documents.

To access your document, click here:

<https://webtest.signix.biz/enter.jsp?m=102&i=no9S3O0Jj4WKMKsfynrgTO>

If you have any questions, please contact Achieva Form Administrator at familytrust@achieva.info .

Click on the *link in the email* to access and sign the fund request.

Once you click the link in the email, you will come to the following page:



ENGLISH

Quit

Hello, Achieva Trust! Let's get started...

You've been asked to review and sign documents online. It's easy!

To get started, you need to agree to receive electronic documents using the electronic signature service under the terms of the E-Sign Legal Consent by choosing **Accept** below. This will confirm that you are able to access all of the documents provided to you in electronic form and you agree to be bound by the terms and conditions of use.

Click **Next** to continue!

Read Legal Consent

Agree to Legal Consent? **Accept** Decline

Next

Click the “**Accept**” circle and then the “**Next**” button.

Achieva, Let's Create Your Signature

First, choose a password. This password will protect your electronic signature and let you access your signed documents after you've finished. Then, choose the style of your signature and initials from the options below.

Please create a secret, easy-to-remember password 6-20 characters long. The password must satisfy the following:

Letters - Required (at least 1 and can be uppercase and/or lowercase unless stated as Required below)

Numbers - Required (at least 1)

Special Characters - Not Allowed (includes: `!@#\$%&*()_+~{}|[]\:"'<>?,./~^)

Select your password

.....

Confirm your password

.....

Use Default Signature/Initial

Achieva Family Trust

AFT

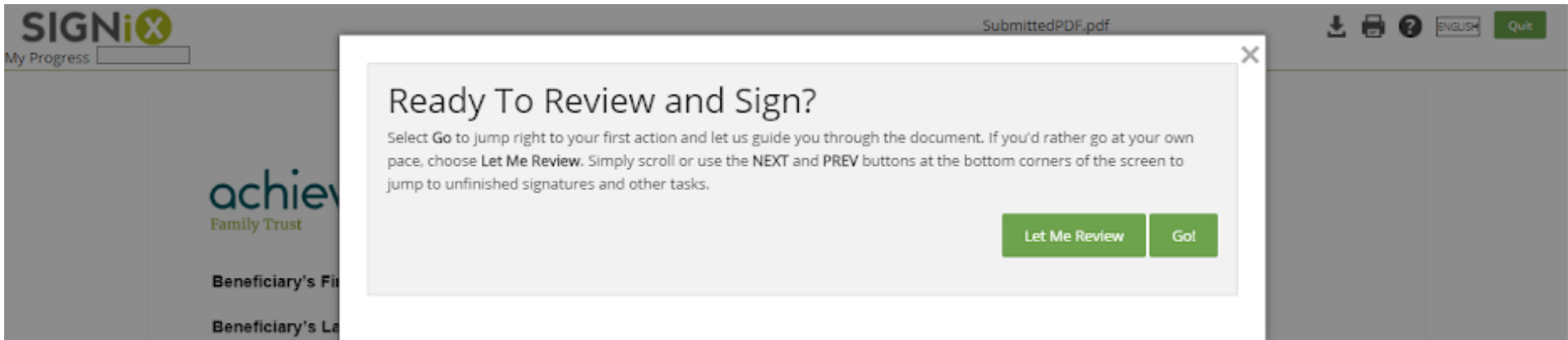
Choose Custom Signature

Let's Go

***** The first time you sign an electronic fund request, you will be asked to create an account at SIGNiX. *****

Simply type the password you'd like to use for your account, then type it again to confirm and hit the "Let's Go" button.

***** The next time you return to sign or review fund request forms, you won't need to do this
- you'll just need to enter your password to log into your account. *****



If you just want to sign your fund request form, hit the “Go!” button. But if you want to review it before signing it, click the “Let Me Review” button.

Original Receipts or Invoice Attached: YES NO

* Please note that original receipt(s) and/or invoice(s) must be provided for reimbursements. *

(If Applicable) Make this payment / UPON RECEIPT MONTHLY
I authorize Achieva Family Trust to pay the bill / disbursement as stated above beginning immediately until cancellation notice or ending date is given to Achieva Family Trust.

Additional Instructions: _____

Required

| | | |
|---|-------------|-------------|
| Submitted By: <u>Achieva Family Trust</u> | <u>Sign</u> | Signed Date |
| (Print) | (Signature) | (Date) |

Relationship to Beneficiary: Self

Phone: _____ Email: achievafamilytrust@achieva.info

PREV NEXT

Whether you hit the “Go!” or “Let Me Review” button, once you are done reviewing and are ready to sign, click on the “Sign” flag and the fund request will be electronically signed. Then click the “Next” button.

SIGNiX SubmittedPDF.pdf

My Progress

Purpose of Fund
Check Payable

Original Receipt

* Please note that original receipt(s) and/or invoice(s) must be provided for reimbursements. *

*(If Applicable) Make this payment: UPON RECEIPT MONTHLY

I authorize Achieva Family Trust to pay the bill / disbursement as stated above beginning immediately until cancellation notice or ending date is given to Achieva Family Trust.

Additional Instructions:

Required

Submitted By: Achieva Family Trust Achieva Family Trust Signed Date

(Print) (Signature) (Date)

Relationship to Beneficiary: Self

Phone: _____ Email: achievafamilytrust@achieva.info

PREV NEXT

Finished Signing?

Almost done! If you're finished with this document(s), tap **Finish** below to confirm your signatures and other entries on this document(s). If you want to spend more time reviewing the document(s), select **Stay Here**. You'll see the documents again, and can click **Finish Signing** at the bottom of the screen when you're done reviewing the documents.

Stay Here **Finish**

If you want to go back and review the fund request, click on the “**Stay Here**” button. If not, click on the “**Finish**” button.

Once you hit “Finish” you will see the confirmation page below:



If you hit the “Review” button, you will be able to see the fund request form with your electronic signature attached:

Original Receipts or Invoice Attached: YES NO

* Please note that original receipt(s) and/or invoice(s) must be provided for reimbursements. *

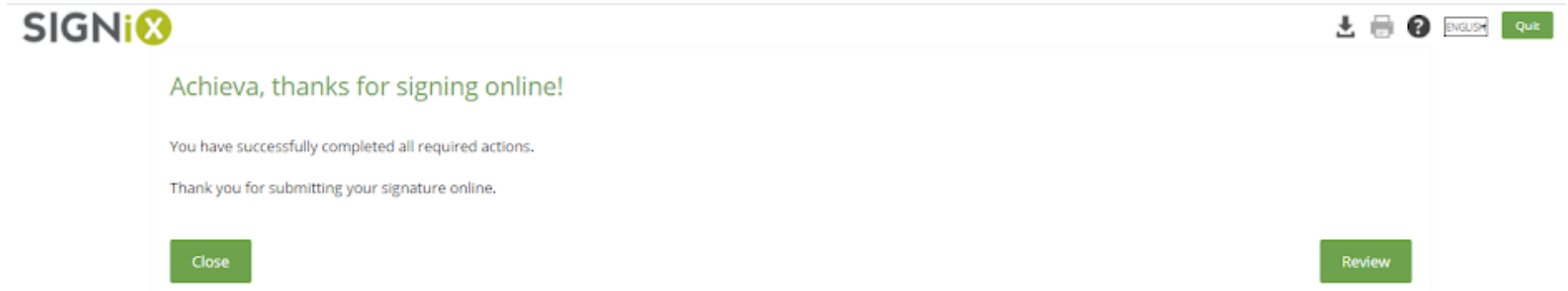
(If Applicable) Make this payment UPON RECEIPT MONTHLY
I authorize Achieva Family Trust to pay the bill / disbursement as stated above beginning immediately until cancellation notice or ending date is given to Achieva Family Trust.

Additional Instructions: _____

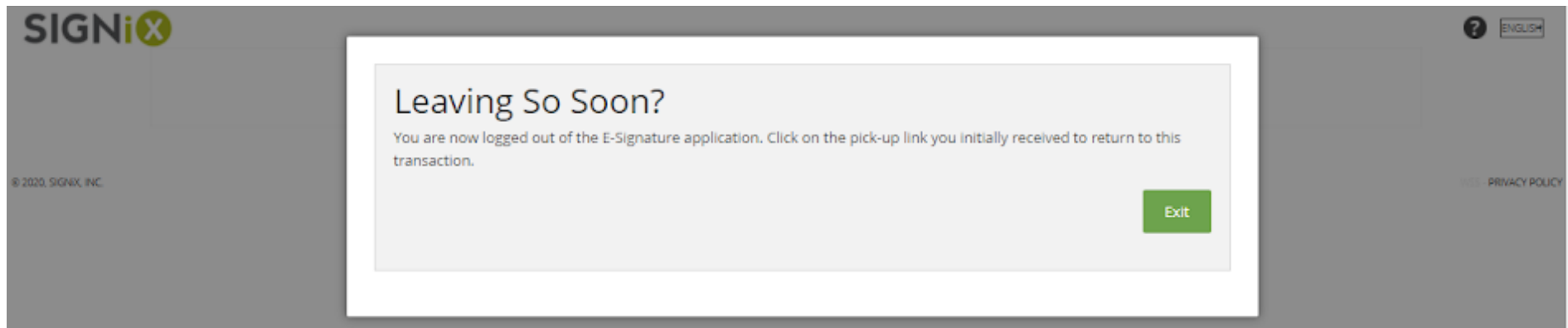
Submitted By: Achieva Family Trust Achieva Family Trust  11/04/2020
(Print) (Signature) (Date)

Relationship to Beneficiary: Self

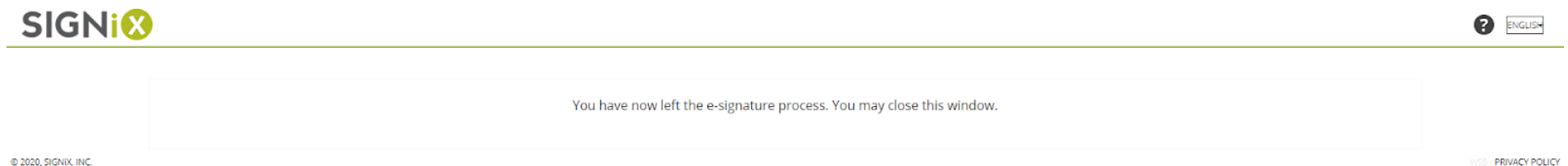
Once you have finished reviewing the fund request form, click on the “**Review Complete**” button and it will take you back to the confirmation page seen below:



Click on the “**Close**” button. This will log you out of the *fund request form*.



You can now hit the “**Exit**” button. This will log you out of the system.





Thanks for using Achieva Family Trust's Electronic Fund Request Form. We hope this new tool will help you more easily request funds from your trust.

As a reminder, in most cases, a check should be received within 10 to 14 business days following receipt, review and approval of the Fund Request.

If you have any questions regarding how to use the Electronic Fund Request Form, please contact your Trust Administrator at 412-995-5000 ext. 565 or familytrust@achieva.org.