

Trexis Insurance offers a convenient e-signature option!

Trexis e-signature is not only convenient, but also takes the responsibility off you, the agent, to retain the application. The process is done completely online for a secure and easy way to have customers electronically sign their policy documents at your office, their home, or on-the-go.

Select 'Bind/Upload Policy with E-Signature' from the Down Payment Summary screen:



E-Signature Procedures

- E-signature documents can be utilized with all customers with a valid email address.
- **E-Signature applications require your acknowledgement the email address entered is a valid email address for the Named Insured.**
- E-signature can be utilized even if the customer visits your office to purchase insurance!
- Agent must assign a password and provide it to the customer to allow access to the Terms & Conditions notice and the application.
- Each required signature area will be clearly marked.
- A copy of the document is available for download once all required signatures are completed.
- If the e-signature process is not completed within 15 days of the effective date, the policy will be set up for cancellation.
- Utilizing other E-signature software (i.e. HelloSign, PandaDoc, DocuSign, AdobeSign, Doscketch, etc.) is acceptable. If any of these outside vendors/software are used, **it is the agent's responsibility to notify Trexis Underwriting if all required signatures are not completed within 15 days so the appropriate action can be taken. Documents are subject to audit by Trexis Underwriting. You must also maintain applications that are signed using outside vendors according to Trexis' guidelines for file maintenance requirements in our Agent manual under Download Materials on Trexis.com.**