

1. Go to Schwab Advisor Center
2. Click on **“Account Management”**
3. Then, under the DocuSign portion of the page, click on **“Go to DocuSign Console”**
4. Click on **“Agreements”** which is located on the top row menu
5. On the left side menu, click the **“Sent”** button
6. Next, click on the **“Shared Access”** dropdown bar located on the left side menu
7. Once in that dropdown menu, click **“Selected User”**
8. Then, **search and click on the user** that sent the documents (i.e Missy, Jodi, etc.)
9. Click the blue **“Select”** button to confirm which user you want to select
10. Using the search box, type in and search the client’s last name (confirm that you are still in the sent folder by clicking the “sent” button on the left side menu)
11. Find which document the client needs to sign (it will most likely be towards the top of the screen as the documents are sorted by the date in which they were sent out; the most recently sent documents are on the top)
12. Click the **“Resend”** button the right side
13. Direct the client to refresh their email for a new email from either BlueStem or Charles Schwab containing the DocuSign package

Get in Touch

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