

# Branch Manager Signature Requests

When a Branch Manager signature is required:

## ❑ eSignature documents:

- ✓ Update to reflect **OSJ** and **OSJ@lplatfrg.com** as the recipient's name and email (the default is Steve.Lank@lpl.com)
- ✓ Use **"1111"** as the SSN/Passcode for the document
- ✓ If Phone number is needed, please use 704-816-8000

Forms

Recipients

To see all validations please scroll to the right

Order	Role	Name	Email	Last 4 SSN	ID Check	Signing Type
1	Account Holder	Client	client@aol.com	0000	No	Remote
2	Financial Advisor	Advisor	advisor@lpl.com	0000	No	Remote
3	OSJ Branch Manager	OSJ	osj@lplatfrg.com	1111	No	Remote

Recipient: Select + Add Recipient Set Reminders: Select

Save & Close Cancel Request

09.14.2021 BuildOut

Validate Previous Complete

Summary History

Forms Request ID

Account Details LPL Account Number

Account Registration

Account Class Brokerage - Non-retirement

## ❑ Wet Signature documents:

- ✓ Send scanned documents to **OSJ@lplatfrg.com**
- ✓ All approved and in good order documents will be forwarded to LPL immediately, with the Rep/Admin copied. Any items not in good order will be addressed with the Rep/Admin.