

Electronic
Signatures with
Class

November 2021

We will reimagine a more simple, automated world for our customers and they will love it!







## **Amod Pandya**

Senior Product Manager

- 10 years in product management
- 2 years with Class
- Previously in US & Singapore
- BSc. Computer Engineering
- Fun = video gaming, brunching and spending time with family.



### **Sebastien Brennan**

Consulting Team Leader

- Over 8 years of industry experience
- 4 years with Class
- Chartered Accountant (CA ANZ)
- SMSF Specialist Practitioner (SSP)
- B Com(Professional Accounting)
- Passion for ocean activities outside of work

## Poll Question 1



Poll 1 – Excluding the Class solution, do you currently use Electronic Signatures in some part of your business?

- Yes
- No, but plan to in the next 12 months
- No, and don't plan to in the next 12 months
- Unsure

## Agenda

- 1. Overview
- 2. Features & Benefits
- 3. Demo
- 4. Sign up Process

Note: Recording, presentation and Q&A summary will be shared following the webinar





# Overview

## Why Electronic Signatures



#### Faster

- 80% of envelopes completed in less than a day\*
- 44% in less than 15 minutes\*

#### Efficient

Reduces manual tasks

 Increases convenience for your customers and employees

#### Savings

- Saves \$36 on average per envelope\*
- Reducing printing, stationary, storage, employee productivity time

#### Secure & Auditable

- More secure compared to snail mail
- Electronic audit trail

\* Source : DocuSign



# WHAT ARE ELECTRONIC SIGNATURES

- Identifies the person signing
- Signing method is reliable
- Consents to the signer using an electronic signature
- Legally enforceable in most countries1

## HOW ARE THEY USED

#### Accounting<sup>1</sup>

- SMSFs Annual Statements, BAS, Minutes & Resolutions, etc.
- Trust Trustee declaration, Compilation Report etc.

## WHO ARE THE KEY SUPPLIERS

- DocuSign (68% market share)<sup>2</sup>
- Adobe (29% market share)<sup>2</sup>

2- Source: Netwealth Advice Tech survey 2021

<sup>1 -</sup> Legal acceptance can vary from state to state. Please check local legislation

## Poll Question 2



Poll 2 – What is the most important priority for you when it comes to choosing an e-signature solution?

- Security & Reliability
- Time Savings
- White Label Branding
- COVID-safe operations



# Features and Benefits

## **Electronic Signatures at Class**



	FEATURES	BENEFITS
SETUP	<ul> <li>Integration with DocuSign</li> <li>White Label Branding</li> <li>Pre-tagged Report (packs)</li> <li>&amp; Custom Reports</li> </ul>	Global leader
PREPARE & SEND	<ul> <li>Draft review</li> <li>External documents</li> <li>Access codes, Expiration and Reminders</li> </ul>	<ul> <li>ISO27001 compliant</li> <li>Increased efficiencies</li> <li>Time Savings</li> </ul>
REVIEW & MANAGE	<ul><li>Signature Tracker</li><li>Notifications</li><li>Mobile signing</li></ul>	<ul><li>COVID-safe</li><li>Quicker turnaround</li></ul>

## **BETA Program**

Feb: June 2021







80% Satisfaction



Up-to 50% Time Savings



## **Demonstration**

## **AHA ideas Portal**

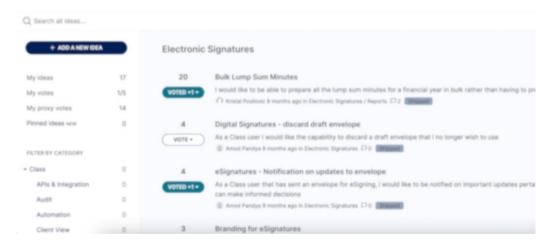
- 13 Features shipped during e-sign BETA
- <a href="https://class.ideas.aha.io/">https://class.ideas.aha.io/</a>
- Register interest
   <a href="https://resources.class.com.au">https://resources.class.com.au</a>
   /aha-registration

#### Ideas



- . Voting for an existing idea shows us that you would like to see these implemented over others
- · You have 5 votes and votes are handed back when an idea is implemented
- . You may cast more than one vote on an idea

Please review our policy and FAQ



## Join our e-Signatures pilot

## FREE till 31 January 2022

(\$1.50 per entity per month thereafter)

## **Register your interest**

class.com.au/esignatures



#### Join our eSignatures pilot

FREE until 31 January, 2022

Are you struggling with paper-based contracts, postal delays and waiting times? Now is the time to transform how you prepare, sign and manage them.

#### Business is better when you go paperless

#### Faster agreements

Get your annual return statements and other documents signed  $\,$  quicker by digitizing the process.

#### Lower costs

Reduce hard costs & spend your money on what matters most to your customers.

#### **Productivity gains**

Eliminate manual tasks and gain efficiencies for your customers in a  ${\tt COVID}\mbox{-safe}$  environment.

#### Increased data security

Improve information security by avoiding the risks of physical data breaches.

Fill in your details below and one of our Class account managers will give you a call.

First Name*		Last Name*
	1	
Company Name*		
Email*		
Postal code*		
Phone Number*		





## Disclaimer

- Any information expressed in this PowerPoint presentation does not purport to be any financial, tax or legal advice as we have not taken into account any of your or your client's financial or tax objectives that are specific to you or your client's circumstances.
- While effort has been taken to make sure the information is as accurate and relevant as possible, it is at best construed as general information on how to use Class software.
- You should not rely on the information provided as advice, instead seek your own independent advice from appropriately qualified practitioners or conduct your own research.
- No warranty is given as to its accuracy and relevance and persons who rely on this information do so at their own risk. The information may also become obsolete as the product evolves and feature changes.