



Electronic Signatures with Class

November 2021

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



Simplify. Automate. Connect.



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

01

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

Accounting¹

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

WHO ARE THE KEY SUPPLIERS

- DocuSign (68% market share)²
- Adobe (29% market share)²

1- Legal acceptance can vary from state to state. Please check local legislation

2- Source : Netwealth AdviceTech survey 2021

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

02

	FEATURES	BENEFITS
SETUP	<ul style="list-style-type: none">• Integration with DocuSign• White Label Branding• Pre-tagged Report (packs) & Custom Reports	<ul style="list-style-type: none">• Global leader
PREPARE & SEND	<ul style="list-style-type: none">• Draft review• External documents• Access codes, Expiration and Reminders	<ul style="list-style-type: none">• ISO27001 compliant• Increased efficiencies• Time Savings
REVIEW & MANAGE	<ul style="list-style-type: none">• Signature Tracker• Notifications• Mobile signing	<ul style="list-style-type: none">• COVID-safe• Quicker turnaround

BETA Program

Feb : June 2021



45 Clients



80% Satisfaction



Up-to 50% Time Savings



Demonstration

03

AHA ideas Portal

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

The screenshot displays the AHA Ideas Portal interface. At the top, the 'CLASS' logo is visible. Below it, a section titled 'Ideas' contains three bullet points: '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', and 'You may cast more than one vote on an idea'. A link to 'Please review our policy and FAQ' is also present. A search bar labeled 'Search all ideas...' is located below the 'Ideas' section. On the left side, there is a sidebar with a '+ ADD A NEW IDEA' button and a list of links: 'My ideas' (17), 'My votes' (1/5), 'My proxy votes' (14), and 'Pinned ideas now' (0). Below these links is a 'FILTER BY CATEGORY' section with a dropdown menu set to 'Class'. The main content area is titled 'Electronic Signatures' and lists three ideas with their respective vote counts and descriptions:

Idea Title	Votes	Description
Bulk Lump Sum Minutes	20	I would like to be able to prepare all the lump sum minutes for a financial year in bulk rather than having to prepare them individually. Kristal Postolic 9 months ago in Electronic Signatures / Reports [0] [0]
Digital Signatures - discard draft envelope	4	As a Class user I would like the capability to discard a draft envelope that I no longer wish to use. Amod Pandya 9 months ago in Electronic Signatures [0] [0]
eSignatures - Notification on updates to envelope	4	As a Class user that has sent an envelope for eSigning, I would like to be notified on important updates pertaining to the envelope. Amod Pandya 9 months ago in Electronic Signatures [0] [0]
Branding for eSignatures	3	

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 COVID-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.

Submit your interest

First Name*

Last Name*

Company Name*

Email*

Postal code*

Phone Number*

Submit Registration

A background image showing two men in a meeting. The man on the left is holding a stack of papers, and the man on the right is holding a tablet. They are both looking down at the documents. The image is overlaid with a teal gradient.

Q & A

and Next Steps



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.
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- 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.