CashPro® Assistant Electronic Signature

Use CashPro online or the CashPro app to electronically sign documents quickly and securely – anywhere, anytime

In the current environment, we know you are seeking ways to keep business running while employees are working from home. Electronic signature – available on CashPro online, the CashPro app, or through email and a browser – allows one or many authorized signers to digitally review, sign, and return completed documents to the bank.

Two electronic signature solutions

**Bank Initiated:** Using Bank of America’s electronic signature solution

- **If your authorized signer is a CashPro user:** Documents for electronic signature are sent to their CashPro Assistant document center, accessible on CashPro online and on the CashPro app
- **If your signer is not a CashPro user:** Documents for electronic signature are sent to the signer’s email. The authorized signer’s email address and phone number must be provided to the bank’s service team at the time of placing the request.

The bank-initiated eSignature solution incorporates DocuSign technology, but you do not need to have a DocuSign account.

**User Initiated:** Using your own DocuSign account

- **If you have your own DocuSign account:** you may prepare and sign documents, then securely route them to a Bank of America email inbox. For more details on the requirements for this process, please refer to our Client-Initiated eSignature Checklist.
- **If you do not have a DocuSign account:** you may rely on our bank-initiated solution described above. Currently DocuSign is the only approved eSignature application we can accept without exception.

**Reminders**

- Users may upload an image of their wet signature or adopt a pre-set style
- If you have not yet used electronic signature with Bank of America and would like to start, please contact your bank representative. There is no setup process or cost.

**Resources (available on CashPro Support & Education)**

- Signing Documents Electronically Fact Sheet
- Signing Documents Electronically in CashPro Assistant Doc Center
- Signing Documents Electronically via Email
- Signing Documents Electronically FAQ
- Client-Initiated eSignature Checklist
- Document Exchange Video
Which documents can be electronically signed?

All treasury and trade documents, onboarding documents (including signature cards and banking resolutions), previously approved non-standard documents and letters of instruction can be electronically signed.

Where is eSignature supported?

Bank of America is approved to use electronic signature with clients incorporated in and accounts domiciled in the United States, Canada, twenty EMEA jurisdictions, Bermuda, the British Virgin Islands, and the Cayman Islands.

North America

• Canada
• United States

EMEA – twenty countries:

Eleven EMEA branches, in-country office:
• Austria
• Belgium
• France
• Germany
• Greece
• Ireland
• Italy
• Netherlands
• Spain
• Switzerland
• United Kingdom

Nine EMEA countries without branch presence:
• Czech Republic
• Denmark
• Finland
• Hungary
• Luxembourg
• Norway
• Poland
• Portugal
• Sweden