

Updated ADV Packets & DocuSign Templates

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To: Edna Kowitz <ekowitz@kowitzfinancialgroup.com>

 2 attachments (2 MB)

Kowitz_ADV Packet_021224.pdf; Kowitz_ADV_Template.json;

Hi Edna,

Please see your updated combined ADV packets (.pdf files) attached. I have also included updated DocuSign templates (.json files). These new DocuSign templates should replace any existing ones. You will need to manually delete the old ones. Please see below for uploading and deleting template instructions. If you would like assistance with this, please let me know and I am happy to help!

To Upload Templates:

1. Save the DocuSign templates in the zip folder (json files) to your computer.
2. Once in DocuSign, click on "Templates" at the top.
3. Click "NEW" then "Upload Template".
4. Select the template file that you saved and click "Open".

To Delete Templates:

1. Once in DocuSign, click on "Templates" at the top.
2. Click on "Name" to sort by name to find duplicates.
3. Compare dates.
4. Delete the older one by clicking the down arrow next to the green "Use".

Thank you,

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