
Deliver a modern customer experience

Customers expect fast, seamless, mobile access to their bank. At the same time, the ever-shifting financial services regulatory landscape makes it challenging to mitigate risk and stay compliant. DocuSign helps you speed up transactions with mobile-first agreements, while our intelligent, automated audit trails and agreement workflows ensure compliance and minimize risks.

Streamline agreement management

From onboarding to loan processing and wire transfers, every transaction involves complex agreements. With the right tools you can automate and digitize agreements by transforming complex static forms into intuitive, easy-to-complete digital forms, identifying your customers digitally, and capturing information accurately the first time, resulting in faster processing and happier customers.

Leverage artificial intelligence (AI) to assess risks

Get 360-degree visibility into what is inside your agreements, regardless of source location. With Total Search and Intelligent Insights powered by Seal, you can identify risks, obligations, and opportunities that exist within your organization.

Enhance security and simplify compliance

Maintain a digital audit trail of all agreements, a complete, time-stamped history of every send, view, print, sign, or decline action. A tamper-evident, court-admissible Certificate of Completion ensures you can comply with most prominent regulations like KYC/AML.

Minimize IT costs and enhance time to value

Implement solutions to digitize your agreement processes within weeks and not months. Pre-built connectors and easy-to-use open APIs allow you to simply plug into existing core solutions, like Finastra and nCino, further automating document generation and sharing processes.

Results

10 of the top 15

financial services firms
rely on DocuSign.

95% decrease

in loan processing time from
over an hour to just five minutes.
Arizona Federal Credit Union

83% reduction

in time to open new customer accounts,
from 12 days to 2 days.
Santander

80% reduction

in average time to contract signature.
Refinitiv

“Cell phones are the branch bank in your pocket. We need to be able to provide everything to our members via mobile. DocuSign easily provides that solution for us.”

Jesus Islas
Digital Banking Manager
Arizona Federal Credit Union

The DocuSign Agreement Cloud for Financial Services

In financial services, agreements are fundamental to the customer moments that matter, like opening an account, securing a loan, or transferring wealth. Asking customers to view tiny PDF forms on a mobile device is the opposite of a modern signing experience. The DocuSign Agreement Cloud integrates seamlessly into existing processes, allowing you to create a fast, frictionless agreement experience that increases conversion and customer satisfaction while maintaining security and compliance.

eSignature

Securely send and sign loan applications and disclosures electronically and maintain a complete audit trail.

Guided Forms powered by Intelledox

Turn complicated forms into intuitive “wizard-style” interviews to capture borrower information.

DocuSign CLM

Manage the full agreement lifecycle from automated generation to real-time negotiation to storage and search for complex contracts like institutional onboarding.

Rooms for Mortgage

Accelerate closing times and improve the borrower experience with a secure, digital workspace for everyone involved in a mortgage, including external participants like title and settlement.

eNotary

Allow notaries to electronically witness and authenticate the execution of agreements.

Total Search powered by Seal

Total Search provides a simple unified search across the entire agreement portfolio and related documents.

Intelligent Insights powered by Seal

Intelligent Insights includes all the cross-repository discovery with AI-powered contract extraction and analytics capabilities.

Integrations

Easily embed DocuSign into your existing tools with 350+ pre-built integrations with the leading lending platforms, including Salesforce, Finastra, nCino, and many more.

To learn more, go to docusign.com/financial-services.

Use case examples

Account opening

Checking/savings accounts

Signature cards

Proof of identity

Consent forms

KYC

Lending

Loan/mortgage applications

eConsent

Loan estimate/waiver

Broker contracts

Underwriting documents

Customer service

Terms of use

W-8/W-9

Address/beneficiary changes

Transaction disputes

Audit and compliance

Capture consent

Regulation E

KYC

About DocuSign

DocuSign helps organizations connect and automate how they prepare, sign, act on, and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature: the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, more than 500,000 customers and hundreds of millions of users in over 180 countries use DocuSign to accelerate the process of doing business and to simplify people's lives.

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