

Focus On Members Not Paperwork

Excellent service is what draws—and keeps—credit union members. But if you're still operating with costly, error-prone, paper-based processes, you may be losing more than your members. Improvements to your credit union's digital banking experience can pay dividends, reinvigorate member engagement, and be implemented quickly. With DocuSign, you can digitize new account, lending and disclosure agreements, making it easy for you to deliver a world-class member experience.

Extend your reach

Effectively eliminate one of the greatest barriers to entry for members: branch proximity. With mobile apps and online services, members can manage everyday banking needs and build closer relationships with their credit union.

Streamline workflow and improve productivity

Reduce the amount of time your employees spend on tedious tasks—like handling documents, re-keying data and manually verifying member ID—and empower them to focus on providing more profitable, value-added services, resulting in higher employee satisfaction and retention.

Accelerate lending times

Streamline the lending process, be it mortgages or car loans. By decreasing the steps and resources related to manual application processes, you can assemble, send and sign faster; reduce time to close; and get paid faster with eNotes that are GSE approved for sale in the secondary market.

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 Salesforce, further automating document generation and sharing processes

15 of the top 15

financial services firms rely on DocuSign

Results

More than 75% faster

processing for pre-authorized debit requests
WASECU

95% decrease

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

Nearly \$300K in savings

the first year and increased member satisfaction
Alliant Credit Union

“When we talk about innovation, member experience and best-in-class security, DocuSign is quite literally in lockstep with where we want to take things.”

Thomas P. Novak
Chief Digital Officer
Visions Federal Credit Union

The DocuSign Agreement Cloud for Credit Unions

Agreements are fundamental to the member moments that matter, like opening an account or securing a loan. Empower members to easily transact with your credit union, whether they are completing a complex loan application from their phone or remotely notarizing an affidavit. The DocuSign Agreement Cloud integrates seamlessly into existing processes, allowing you to create a fast, frictionless agreement experience that increases conversion and member satisfaction while maintaining security and compliance.

eSignature

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

Notary

Sign and notarize documents remotely and electronically via a secure audio-visual session. Mitigate risk with a robust audit trail that includes a tamper-evident recording and electronic journal.

Guided Forms powered by SmartIQ

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

Identify

Secure access to agreements for account opening, loan processing and more with a single platform that provides digital signer identification and authentication through enhanced methods.

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.

Asset Vaulting powered by eOriginal

Maintain an authoritative electronic copy of the promissory note, including any transfers of ownership control.

Integrations

Easily embed DocuSign into the platforms where mortgage work is done with 350+ pre-built integrations, like Mortgage Cadence, nCino, Finastra 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

Affidavits

Lending

Loan/mortgage applications

eConsent

Loan estimate/waiver

Broker contracts

Underwriting documents

Lien Release

Power of Attorney

Deed of Trust

Customer service

Terms of use

W-8/W-9

Address/beneficiary changes

Transaction disputes

PAD forms



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, over a million customers and more than a billion users in over 180 countries use the DocuSign Agreement Cloud to accelerate the process of doing business and simplify people's lives.

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