

# Adobe Sign – Customer Journey Workflows

This document provides an overview of the customer journey workflows supported by Adobe Sign, designed to help advisers navigate the digital signing experience confidently and consistently. Please use this as a reference for understanding when and how to use each workflow.

## New investor

| New investor – any combination of products (ISA, GIA, SIPP) and Adviser Charges Agreement (Transfers)                                 |                 |
|---|-----------------|
| Workflow name   | Workflow number |
| New investor – any combination of products (ISA, GIA, SIPP) and Adviser Charges Agreement   | 1               |
| New investor – any combination of products (ISA, GIA, SIPP) and Adviser Charges Agreement - transfers for any combination of products | 2               |
| New investor – any combination of products (ISA, GIA, SIPP) and Adviser Charges Agreement - transfers for ISA and SIPP                | 3               |
| New investor – any combination of products (ISA, GIA, SIPP) and Adviser Charges Agreement - transfer for ISA                          | 4               |
| New investor – any combination of products (ISA, GIA, SIPP) and Adviser Charges Agreement - transfer for SIPP                         | 5               |
| New investor – any combination of products (ISA, GIA, SIPP) and Adviser Charges Agreement - transfer for GIA                          | 6               |

| New investor – any combination of products (ISA, GIA, SIPP) and Adviser Charges Agreement (Direct Debits)                           |                 |
|---|-----------------|
| Workflow name   | Workflow number |
| New investor – any combination of products (ISA, GIA, SIPP) and Adviser Charges Agreement - Direct Debit for every product          | 7               |
| New investor – any combination of products (ISA, GIA, SIPP) and Adviser Charges Agreement -Direct Debit for ISA and SIPP (personal) | 8               |
| New investor – any combination of products (ISA, GIA, SIPP) and Adviser Charges Agreement -Direct Debit for ISA                     | 9               |
| New investor – any combination of products (ISA, GIA, SIPP) and Adviser Charges Agreement -Direct Debit for SIPP                    | 10              |
| New investor – any combination of products (ISA, GIA, SIPP) and Adviser Charges Agreement - Direct Debit for GIA                    | 11              |
| New investor – any combination of products (ISA, GIA, SIPP) and Adviser Charges Agreement -Direct Debit for ISA and GIA             | 12              |

**New investor – any combination of products (ISA, GIA, SIPP) and Adviser Charges Agreement (Transfers and Direct Debits)**

| Workflow name   | Workflow number |
|---|-----------------|
| New investor – any combination of products(ISA, GIA, SIPP) and Adviser Charges Agreement - SIPP Direct Debit and Transfer | 13              |
| New investor – any combination of products(ISA, GIA, SIPP) and Adviser Charges Agreement - ISA Direct Debit and Transfer  | 14              |

**Existing investor**

**Existing investor - new product**

| Workflow name                                      | Workflow number |
|--|-----------------|
| ISA Application Only                               | 15              |
| Offshore Bond (held within a GIA) Application Only | 16              |

**Existing investor - new product with transfers**

| Workflow name   | Workflow number |
|---|-----------------|
| Existing investor - new product with transfers - SIPP application with transfer | 17              |
| Existing investor - new product with transfers - ISA application with transfer  | 18              |
| Existing investor - new product with transfers - GIA application with transfer  | 19              |

### Existing investor - new product with transfers and direct debit

| Workflow name  | Workflow number |
|--|-----------------|
| ISA Application Only   | 20              |
| Offshore Bond (held within a GIA) Application Only   | 21              |
| Existing investor - new product with transfers - SIPP application with transfer and direct debit | 22              |
| Existing investor - new product with transfers - ISA application with transfer and direct debit  | 23              |
| Existing investor - new product with transfers - GIA application with transfer and direct debit  | 24              |

### Existing investor - SIPP Payments and Direct Debits

| Workflow name   | Workflow number |
|---|-----------------|
| Direct Debit Mandate (investor, Employer, Direct Debit Payer)   | 25              |
| Record of Payments Due  | 26              |
| Record of Payments Due and Direct Debit Mandate (signed by Employer)  | 27              |
| SIPP Supplementary Contributions Application Form (Employer)  | 28              |
| SIPP Supplementary Contributions Application Form (investor)  | 29              |
| SIPP Supplementary Contributions Application Form (Employer and investor) and Direct Debit Mandate (Employer) and Direct Debit Mandate (investor) | 30              |
| SIPP Supplementary Contributions Application Form and Direct Debit Mandate (investor)   | 31              |
| Benefit Payment Form  | 32              |

### Existing investor -Transfer Only

| Workflow name    | Workflow number |
|------------------|-----------------|
| SIPP Transfer In | 33              |
| ISA Transfer In  | 34              |
| GIA Transfer In  | 35              |

### Existing investor - Other

| Workflow name   | Workflow number |
|---|-----------------|
| Investor Online Registration                              | 36              |
| Adviser Charges Agreement (Single Investor)               | 37              |
| DFM Authorisation   | 38              |
| Expression of Wish  | 39              |
| Adviser Online Registration Form                          | 40              |
| Transitional Tax-Free Amount Certificate Application Form | 41              |

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