wealthtime classic

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
Existing investor - new product with transfers - SIPP application with transfer and direct debit	20
Existing investor - new product with transfers - ISA application with transfer and direct debit	21
Existing investor - new product with transfers - GIA application with transfer and direct debit	22

Existing investor - SIPP Payments and Direct Debits	
Workflow name	Workflow number
Direct Debit Mandate (investor, Employer, Direct Debit Payer)	23
Record of Payments Due	24
Record of Payments Due and Direct Debit Mandate (signed by Employer)	25
SIPP Supplementary Contributions Application Form (Employer)	26
SIPP Supplementary Contributions Application Form (investor)	27
SIPP Supplementary Contributions Application Form (Employer and investor) and Direct Debit Mandate (Employer) and Direct Debit Mandate (investor)	28
SIPP Supplementary Contributions Application Form and Direct Debit Mandate (investor)	29
Benefit Payment Form	30

Existing investor -Transfer Only	
Workflow name	Workflow number
SIPP Transfer In	31
ISA Transfer In	32
GIA Transfer In	33

Existing investor - Other	
Workflow name	Workflow number
Investor Online Registration	34
Adviser Charges Agreement (Single Investor)	35
DFM Authorisation	36
Expression of Wish	37
Adviser Online Registration Form	38
Transitional Tax-Free Amount Certificate Application Form	39

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