Subject: Required Process Update: Third-Party Authorization Form + DocuSign Instructions

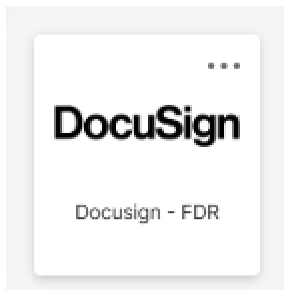
As a reminder, agents must obtain a signed Authorization to Release Information form before speaking with any third party on behalf of a client. Verbal authorization during the Welcome Call is no longer acceptable.

If a third party is assisting the client, please ensure the signed form is uploaded into the Widget prior to any communication.

This is ONLY for FDR clients.

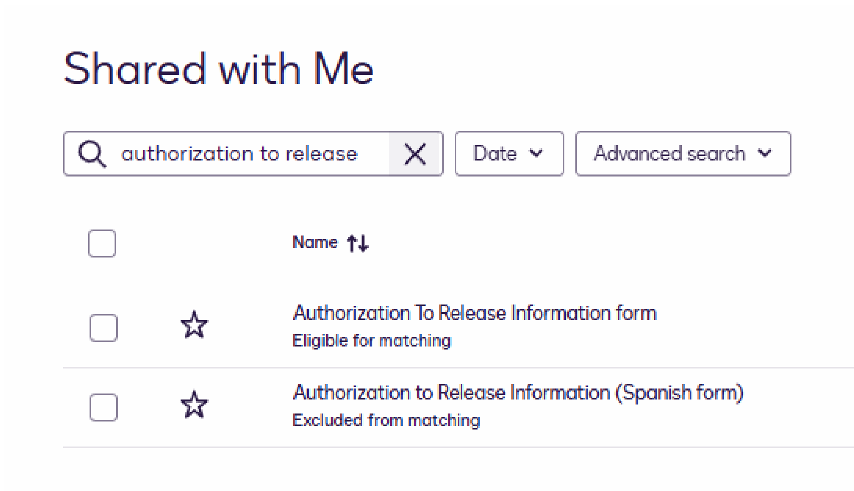
How to Access & Complete the Authorization Form in DocuSign:

- Log into DocuSign

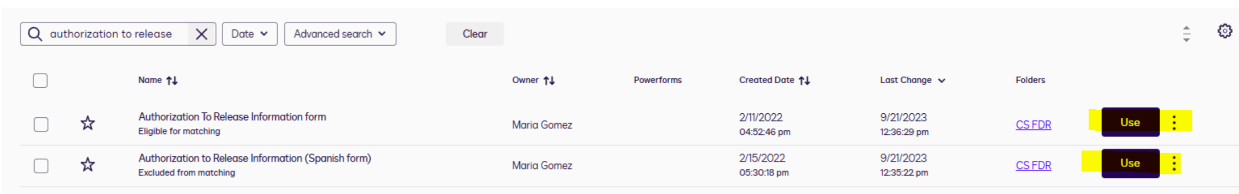


- Click on "Templates" in the top navigation bar

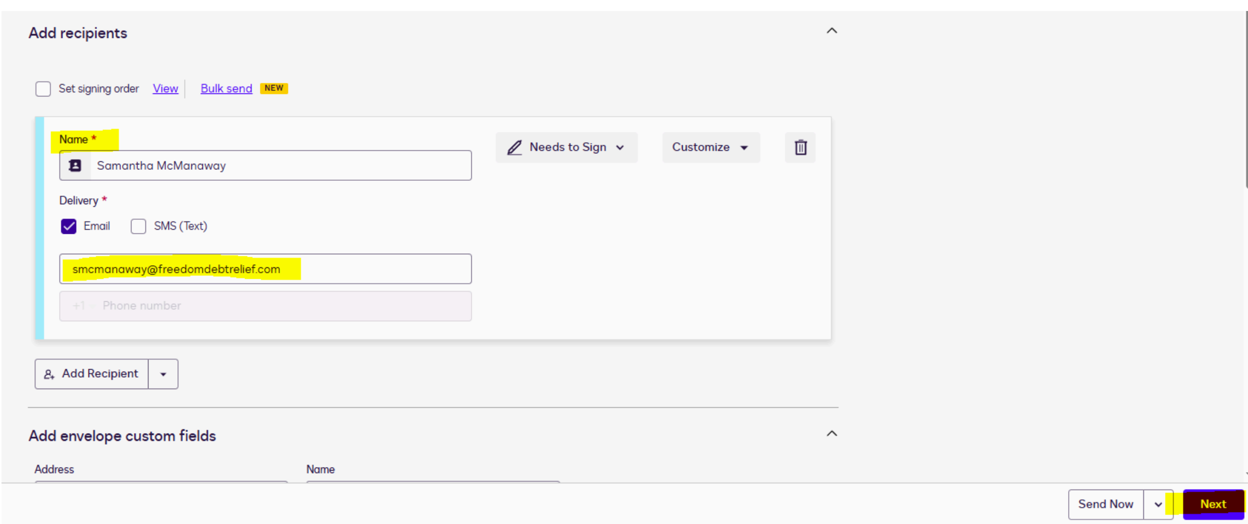
- Use the search bar to locate the correct form:
    - Authorization_to_Release_Information_FDR_EN – for English-speaking clients
    - Authorization_to_Release_Information_FDR_SP – for Spanish-speaking clients



- Click "Use" next to the correct template



- Add the Client's Name and Email Address to send the Docusign and click Next



- Add a text box and fill in the Third Party Authorization's Name, Address, Phone Number, Email Address **(THIS IS NOT THE CLIENT - THIS IS FOR THE THIRD PARTY AUTHORIZATION'S INFORMATION)**

I/we, the undersigned(s), hereby grant Freedom Debt Relief, LLC ("FDR") permission to release program information about my/our Freedom Debt Relief Program ("Program") to the following individual:

Name: Samantha McManaway

Address: 123 No Street Mesa, AZ 85210

Phone Number: 000-000-0000

Email Address: smcmanaway@freedomdebtrelief.com

- Click "Send" to deliver the form for signature to the client
- Once signed, download and upload the completed form into the "Open Documents" section of Salesforce

OPEN DOCUMENTS

If You're Unable to Send the Form:

If you do not have the ability to send the DocuSign form yourself, please notify us by providing:

- The client's Salesforce link
- The third party's full name, address, phone number, and email address

We will handle the form delivery from there and advise once it has been received and uploaded into the client's file.

Quick Reminders:

- Welcome Call agents will **not** communicate with any third party unless the signed form is on file
- This is a mandatory requirement for all files involving third-party communication
- This will be uploaded into the Agent Drive

Thank you for your attention and continued support. If you have any questions, please reach out to wholesale@freeomdebtrelief.com.