

The JBWere logo is displayed in a white, serif font against a dark background. The letters 'JB' are larger and more prominent than 'Were'.

JBWere Client Portal

View and Sign Documents

Putting wealth to work for generations

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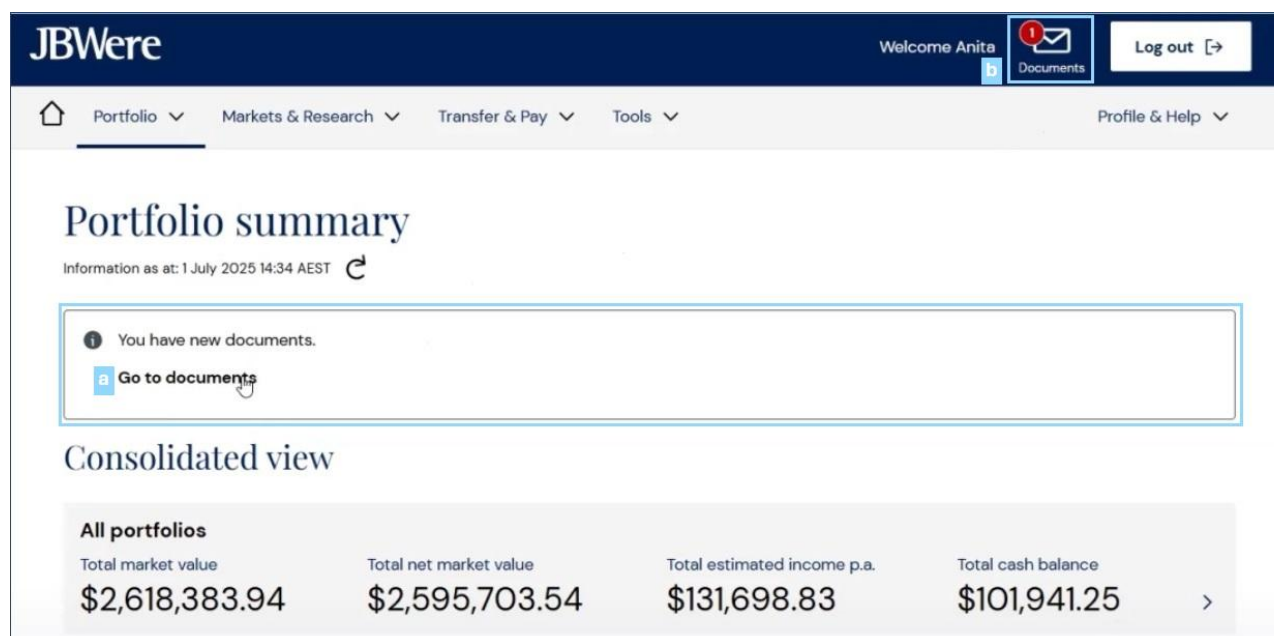
Managing documents

The JBWere Client Portal makes it easy to securely access, review and sign documents shared with you by your advice team. This guide explains how to access documents; complete electronic signatures using DocuSign and check the status of documents within the JBWere Client Portal.

Accessing documents

When a new document has been shared by your advice team to be viewed or signed, you will be notified on the **Portfolio summary** page, in the **You have new documents** banner (a) and a red circle will appear on the **Documents** icon (b).

To view or sign the document, click the **Go to documents** link (a) or the **Documents** icon (b).



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Portfolio summary

Information as at: 1 July 2025 14:34 AEST 

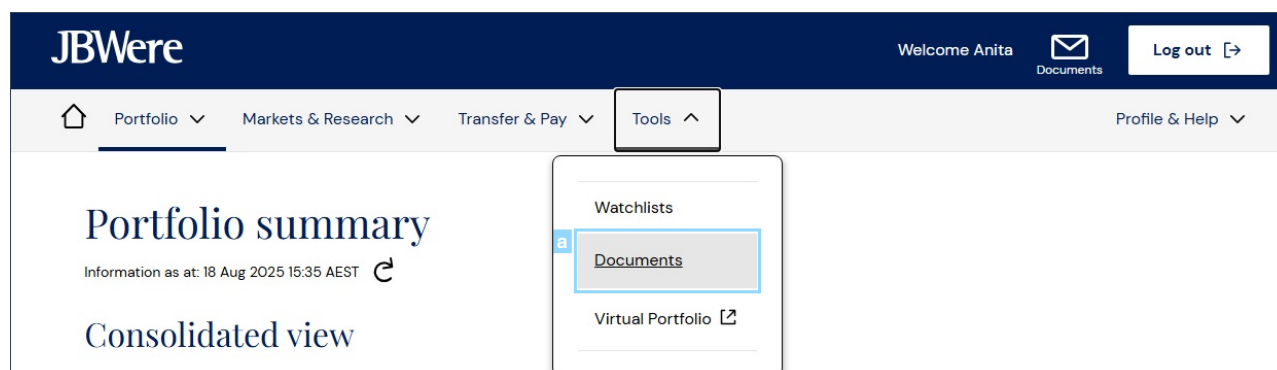
 You have new documents.

 [Go to documents](#)

Consolidated view

All portfolios			
Total market value	Total net market value	Total estimated income p.a.	Total cash balance
\$2,618,383.94	\$2,595,703.54	\$131,698.83	\$101,941.25 

Tip: You can also navigate to the document by selecting **Tools** then **Documents** (a).



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Portfolio summary

Information as at: 18 Aug 2025 15:35 AEST 

Consolidated view

Watchlists

 [Documents](#)

Virtual Portfolio 



Signing documents

From the **My Documents** page click the row of the document you would like to sign from the library of documents that have been shared with you.

The **Required action** column indicates if the document shared with you requires you to **Sign** or **Read** it.

The **Sign by date** column indicates the date the document must be signed by before it will expire.

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My documents

View and sign documents securely.

Filter 

Showing 1 – 20 of 68 documents

Last received 	Account name & account number 	Document description & Reference ID	Required action	Sign by date 	View details
23/06/2026	Jane Rose Super Fund 1048909	Change of Address form edit c96b642c-561e-4524-bf35-44653d17f7b5	Sign	21/09/2026	>
23/06/2026	Jane Rose Super Fund 1048909	Change of Address Sign Only 69896de3-1e7c-425c-84b3-b51c8fc9ea3b	Sign	21/09/2026	>
23/06/2026	Jane Rose Super Fund 1048909	Portfolio Valuation ca2b6a6b-ba00-488b-bc4a-d173646c5105	Read		>
23/06/2026	Jane Rose Super Fund 1048909	Annual Report b9db3c5f-4b3a-462b-9513-8231b0fb786f	Sign	21/09/2026	>

From the **Document details** page click **Sign** in the **Action** column to commence signing the document using Docusign.

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Markets & Research

Transfer & Pay

Tools

Profile & Help

[Back to my documents](#)

Document details

Reference ID 69896de3-1e7c-425c-84b3-b51c8fc9ea3b

The documents below are available for your review. Please complete any required actions as indicated. If you have any questions, contact your Adviser.

If you have recently completed a document, please allow up to 60 seconds for the status and required actions to update. To view the most current status, you may use the **Refresh for latest status** button.

Information as at: 23 Jun 2026 20:40 AEST

Refresh for latest Status

Document name	Size	Sign by date	Status	Action
JBWere Change My Postal Address Jane Rose.pdf	0.56MB	21 Sep 2026	New	Sign

Sign only or Sign and Edit

Within the same browser the Docusign functionality will open allowing you to either **Sign only** or **Sign and Edit** the document that has been shared.

How to determine if the document shared with you is **Sign only** or **Sign and Edit**?

Sign only documents will appear in Docusign with a **Start** option on the top left of the page and a purple **Sign** box in the Signature box on the form or document. See page 5 for the detailed instructions on how to sign these documents.

Documents shared for **Sign and Edit** will appear in Docusign with a **Fields** menu on the left side of the page. Each of the fields can be dragged and dropped into the form allowing you to edit and sign. See page 6 for detailed instructions on how to edit and sign these documents.

Sign only

- If you have reviewed the document and you are ready to sign, click **Start** and then click **Sign** or just click **Sign**.
- You will need to **Adopt a signature**. The process for adopting a signature is explained further below.

Note: You are not able to edit any of the prefilled fields on a Sign only document. If you would like to make changes, contact your adviser.

Review and complete

Finish

Start

DocuSign Envelope ID: D0C628FD-4084-8EFC-8104-84FE5F4C1750

DEMONSTRATION DOCUMENT ONLY
Reviewed by DocuSign Online and approved. 02/05/2022
895 3rd Ave., Suite 1700 • Seattle 1 Washington 98104 • (206) 219-0200
www.docusign.com

JBWere
Change My Postal Address
28 November 2022

Your details

1. Please provide your Account details

JBWere Investor Number(s)

JBWere Account Name(s)

1. 1 0 4 8 9 0 9

Jane Rose Super Fund

2.

3.

4.

5.

Account details

2. Change Account Address

New mailing address for account(s) listed in section 1 (This will change your CHES registered address for sponsored accounts)

1 Smith Street

Suburb

State

Postcode

Country

Melbourne

V I C

3 0 0 0

Australia

☒ Tick if your residential address is the same as the mailing address

Account Holder(s) Signatures

1st Individual

☒ Individual (personal) ☐ Individual (Trustee) ☐ Director ☐ Sole director and sole secretary

☐ Chairperson/Secretary/Treasurer ☐ Partner ☐ Other (please specify)

Signed by: Full name Jane Rose

Signature 

Date signed (DD/MM/YYYY) 23/6/2026 8:44 PM AEST

Search

View Pages

Download

Print

100%

Sign and edit

Documents shared that can be signed and edited will appear in Docusign with a **Fields** menu on the left of the page. Each of the fields can be dragged and dropped into the form.

- The **Text** field will allow you to enter data into any field. Drag the Text field into any place on the form and start typing. You can drag multiple **Text** boxes onto the document. You can remove any **Text** box you have added by clicking the red X.
- You can use the **Checkbox** to add a tick to any field.
- Drag the **Signature** field to the appropriate location on the form. You will need to **Adopt a signature**. The process for adopting a signature is explained further below.
- Once you have added your signature, the **Date Signed** box must also be dragged onto the form for completion

Drag and drop fields from the left panel onto the document

Finish

FIELDS

- Signature
- Initial
- Stamp
- Date Signed
- My Name
- My First Name
- My Last Name
- E-mail Address
- Company
- Title
- Text
- Checkbox

JBWere
Change My Postal Address
28 November 2022

Your details

1. Please provide your Account details

JBWere Investor Number(s) JBWere Account Name(s)

1. 1 0 4 8 9 0 9 Jane Rose Super Fund

2.

3.

4.

5.

Account details

2. Choose Account Address

New mailing address for account(s) listed in section 1 (This will also be your CHES registered address for sponsored accounts)

1. Smith Street

Suburb State Postcode Country

☐ Tick if your residential address is the same as the mailing address

Account Holder(s) Signatures

1st Individual

☒ Individual (personal) ☐ Individual (Trustee) ☐ Director ☐ Sole director and sole secretary

☐ Chairperson/Secretary/Treasurer ☐ Partner ☐ Other (please specify)

Signed by: Full name Jane Rose

Signature

Date signed (DD/MM/YYYY)

Powered by docusign

English (UK)

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Adopting your signature

Add your signature to the document by choosing **Select Style**, **Draw** or **Upload**.

- **Select Style** will allow DocuSign to choose a signature for you
- **Draw** will allow you to draw your own signature using your mouse or stylus
- **Upload** will allow you to upload a saved image of your signature

All styles will be accepted by JBWere.

Then click **Adopt and Sign**.

Adopt Your Signature

Confirm your name, initials and signature.

Full Name *

Jane Rose

Initials *

JR

SELECT STYLE

DRAW

UPLOAD

PREVIEW

Change Style

Signed by:

Jane Rose

D439A838D17145B7...

DS

JR

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts.

Adopt and Sign

Cancel

7 JBWere Client Portal – How to view and sign documents

Once your signature has been added, click **Finish** to complete the signing process.

Review and complete

Finish

Document Envelope ID: D9C629FD-4094-8EFC-8104-54FE6F6C1750

JBWere

Change My Postal Address

29 November 2022

DISMANTLING DOCUMENT ONLY
PROVIDED BY DOCUMENT CAPTURE SERVICE
915 3rd Ave. Suite 1700 • Seattle • Washington 98104 • (206) 219-0290
www.docuSign.com

Your details

1. Please provide your Account details

JBWere Investor Number(s)

JBWere Account Name(s)

1. 1 0 4 8 9 0 9

Jane Rose Super Fund

2.

3.

4.

5.

Account details

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3 0 0 0

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Account Holder(s) Signatures

1st Individual

☒ Individual (personal)

☐ Individual (Trustee)

☐ Director

☐ Sole director and sole secretary

☐ Chairperson/Secretary/Treasurer

☐ Partner

☐ Other (please specify)

Signed by: Full name

Required - Signature Applied

Signature

Signature

Jane Rose

Download (11 KB)

Date signed (DD/MM/YYYY)

23/6/2025 8:44 PM AEST

Ready to finish?

You've completed the required fields. Review your work, then select Finish.

Finish

Once you have signed the document the **Status** column will update to reflect the status of **Completed** if you are the only signer or the last signer. Otherwise, the status will update to **Signed by 1** or **Signed by 2** and so on depending on how many signatories have completed the document.

8 JBWere Client Portal – How to view and sign documents



Checking the Status and Action required of a document

From **Document details** you can see the **Status** of each document:

- **New:** The document has not yet been signed by you or any other signatories
- **Signed by 1:** The document has been signed you or by another signatory if you have not yet signed and there are other signatories
- **Completed:** The document has been signed by you and all other signatories if there are other signatories

From **Document details** you can see the **Action** required for each document:

- **Sign:** The document has not yet been signed you
- **View:** You have signed the document
- **Download:** The document has been signed by all required signatories or it is a view only document that does not require a signature

JBWereLog out [→]

[Home](#) [Portfolio](#) [Markets & Research](#) [Transfer & Pay](#) [Tools](#) [Profile & Help](#)

[< Back to my documents](#)

Document details

Reference ID 445b459a-40c5-4d68-9974-74edf601e34e

The documents below are available for your review. Please complete any required actions as indicated. If you have any questions, contact your Adviser.

If you have recently completed a document, please allow up to 60 seconds for the status and required actions to update. To view the most current status, you may use the **Refresh for latest status** button.

Information as at: 10 Jul 2026 15:21 AEST

[Refresh for latest Status](#)

Document name	Size	Sign by date	Status	Action
JBWere Change My Postal Address NO Hashtags.pdf	0.56MB	08 Oct 2026	New	Sign
JBWere Change My Postal Address With 2 Hashtags.pdf	0.57MB	08 Oct 2026	Signed by 1	View
Update Enterprise Disclaimer.docx	1.00MB			Download
JBWere Change My Postal Address No edit With Hashtags.pdf	0.60MB	08 Oct 2026	Completed	Download

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