

# North

## Terms of use & instructions

IRIS client flyer

### Document summary

This document provides important terms for use for the resource 'Your quick intro to the new world of retirement income' (Content) as well as the steps for editing the pdf to allow you to personalise for your business and share with your clients and/or network.

### Need further assistance?

If you need help at any stage, you can contact your dedicated **business development representative**.

### Terms of use

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# How-to guide

Note: please save and open the pdf with **Adobe Acrobat** in order to be able to follow these instructions.

## Step 1.

Like to know more?

Interested in learning more about how an IRIS could fit with your retirement strategy?

Reach out to

[business name]

[contact number]

[email@email.com]

[address]

Add your business name and complete the contact fields at the end of the document. Add your disclaimer to the disclaimer section at the bottom.

## Step 2.

Search tools

Create PDF

Combine Files

Edit PDF

Fill & Sign

Export PDF

Organize Pages

Send for Comme...

Comment

Scan & OCR

Protect

More Tools

In the right-hand navigation menu, select 'More Tools'.

## Step 3.

Forms & Signatures

Fill & Sign

Prepare Form

Certificates

Under 'Forms & Signatures', select 'Prepare Form'.

## Step 4.

Insert business

Properties...

Move Up in Tab Order

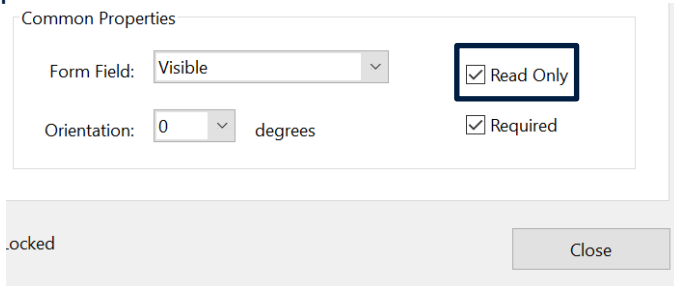
Move Down in Tab Order

Rename Field...

Right click on the business name field box, then select 'Properties'.

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### Step 5.



Common Properties

Form Field: Visible ☒ Read Only

Orientation: 0 degrees ☒ Required

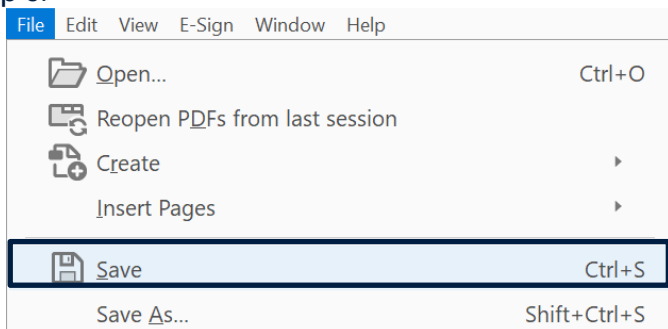
locked Close

Select the 'Read Only' checkbox, then close the window.

Repeat the same step for the contact field box on page 3.

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### Step 6.



File Edit View E-Sign Window Help

Open... Ctrl+O

Reopen PDFs from last session

Create ▶

Insert Pages ▶

Save Ctrl+S

Save As... Shift+Ctrl+S

Click 'File' then 'Save' to override the original editable version.

Now it's time to share with your clients.

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