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Terms of use & instructions

SMA's client flyer

Document summary

This document provides important terms for use for the resource 'SMA's - an investment strategy that evolves with you' (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?

This flyer is a summary of some benefits related to SMAs. If you would like to learn more about how an SMA could fit with your investment 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

Open

Prepare Form

Add

Certificates

Add

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

Step 4.

Insert business

Properties...

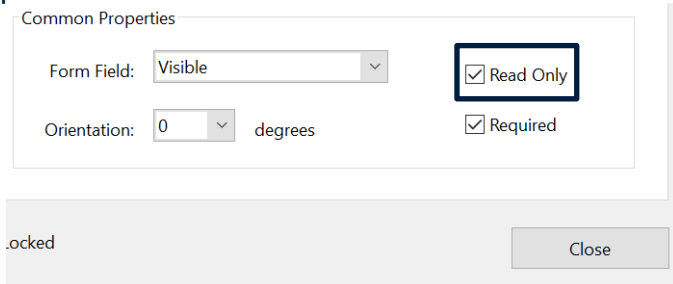
Move Up in Tab Order

Move Down in Tab Order

Rename Field...

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

Step 5.



Common Properties

Form Field: Visible ☒ Read Only

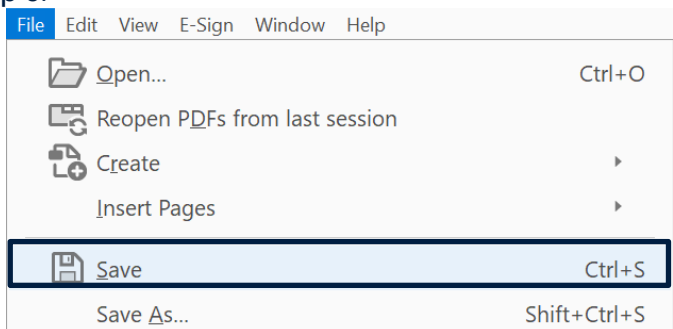
Orientation: 0 degrees ☒ Required

locked Close

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

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

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.
