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**Contact Details**

Account Number: \_\_\_\_\_

Client Contacted: \_\_\_\_\_

Date/Time of Verbal Contact: \_\_\_\_\_

Telephone #: \_\_\_\_\_

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**Request Details**

Transaction Amount: \_\_\_\_\_

1<sup>st</sup> Party ☐

3<sup>rd</sup> Party ☐

Recipient/Payee: \_\_\_\_\_  
(for 3<sup>rd</sup> Party)

Payment Method: \_\_\_\_\_

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**Representative Certification**

*\*I hereby attest that the above "details of contact" and "details of request" are true, accurate, and complete.*

*\*Verbal confirmation occurred with my client and they are authorized to transact on the above-referenced account.*

*\*Details of the transaction were discussed and are consistent with client behavior.*

*\*Telephone number and email address utilized for DocuSign process belong to client and are known to me.*

☐ If client email/telephone number utilized for DocuSign does not match info of record, check this box if ESI's Client file information should be updated.

Representative Signature \_\_\_\_\_

Date \_\_\_\_\_