



E-Signature Checklist for Business Brokers

Which documents to sign online, what to check before you send, and how to set it up once.

FREE CHECKLIST

1. Documents to sign online

- ☐ Buyer registrations and NDAs
- ☐ Engagement and listing agreements
- ☐ Letters of intent (LOIs)
- ☐ Co-brokerage agreements
- ☐ Seller disclosures and questionnaires
- ☐ Purchase agreements and closing documents (with the parties' attorneys)

May need special handling: wills and trusts, family law documents, documents that require in-person notarization, and some real estate documents. Check your state's rules.

3. Security and proof

- ☐ ESIGN Act and UETA compliant tool
- ☐ Signer identity verified (email, code or ID)
- ☐ Audit trail: who signed, when, from where
- ☐ Encrypted sending and storage
- ☐ Time-stamped signed PDF
- ☐ Signed copy sent to every party

5. Set it up once

- ☐ Build a template for every document you send repeatedly
- ☐ Link each document field to the matching CRM field (use the Document Template Planner)
- ☐ Pre-fill known information from the CRM so clients don't retype it
- ☐ Test each template with a colleague before using it with clients
- ☐ Send from the contact record with one button, and reuse the template without limit

With Vertica Sign: included in Vertica CRM at no extra cost. Every field a client completes is saved on the signed PDF and in the matching CRM field at the same time, updating buyer, seller and listing profiles, the data room and email and text marketing in real time.

"Having people sign online and having it all in the system saves us so much manpower and wasted time." Sam Gabler, business broker

General information, not legal advice. Full article: "A DocuSign Alternative for Business Brokers" at businessbrokerscrm.com.

2. Before you send

- ☐ Correct signer names and email addresses
- ☐ Signing order set (e.g., buyer, then seller)
- ☐ Required fields marked
- ☐ Latest template version
- ☐ Expiry date set (e.g., NDA term)
- ☐ Reminders turned on
- ☐ Statement that the parties agree to sign electronically

4. Record keeping

- ☐ Signed PDF saved to the contact record
- ☐ Completed fields saved to CRM fields
- ☐ Buyer, seller or listing profile updated
- ☐ Next step triggered (data room access, follow-up task)
- ☐ Retention period agreed with your attorney