

DocFox is EH Private Bank's chosen vendor for business account onboarding. DocFox assists in the collection & verification of documents necessary for business account opening. At EH Private Bank, your security and safety online is of utmost importance to us, given the sensitivity of the data we are handling. DocFox is an SOC 2 compliant organization, where data security is paramount with strict security protocols in place across all business lines. You can read more information about our business document collection and verification partner, DocFox at: [www.ehprivate.bank/business/docfox](http://www.ehprivate.bank/business/docfox)

## A Guide to Understanding Your Online Experience with EH Private Bank DocFox

### 1 Email invitation

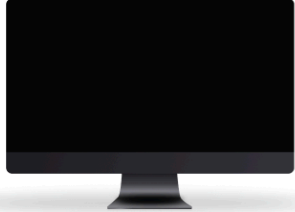
You will first receive an email from **compliance@acme.com** inviting you to upload documents. Click the "Upload Documents" button to be taken to ACME's Document Portal



**Questions?**  
We're a phone call away...  
**EH Private Bank**  
**Client Services**  
**(323) 602-6000**

### 2 Welcome!

You'll then be taken to the Welcome page when entering ACME's Document Submission Portal. Click the "Next" button to proceed.



### 3 Process Explained

You'll then be given a brief description of the process when uploading the relevant document(s). Click the "Get Started" button to start the journey.



### 4 Upload document(s)

On your document dashboard, you'll have visibility of what document(s) you may need from you. Now, to upload the document(s), click on any of the "Upload Document" boxes and follow the guided instructions.

### 5 You're done for now

Once all the relevant document(s) have been uploaded, you may click on the "Leave Page" button or click the "Logout" button in the top-right corner of the page. Document(s) are then processed by ACME and you'll be able to view the status of each document along the way.



### 6 Needing to return?

If there were document(s) you were unable to upload or didn't have on hand, not to worry. You can re-enter the portal by clicking on the "Upload Document(s)" button in the initial invitation email to return and continue from where you left off.

