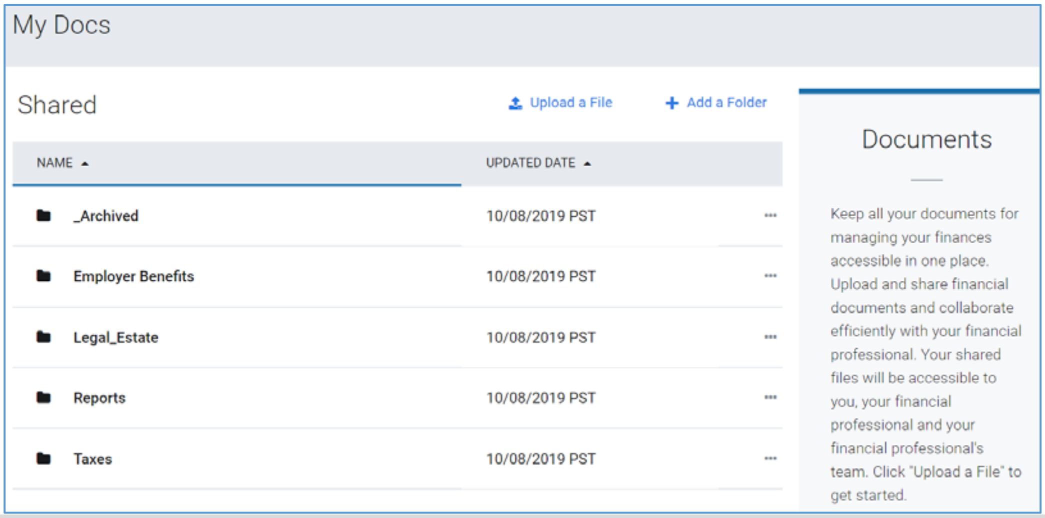
CLIENT PORTAL: Share Documents with your Financial Professional

Description

The shared folder allows you to upload and share financial documents with your financial professional.

Pre-defined folder names are setup to provide guidance to the types of documents to share.

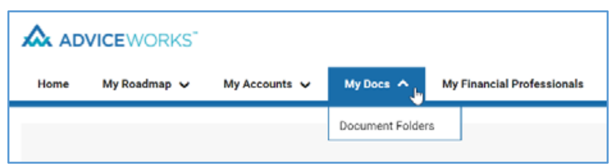


First Things First - Sharing Documents with your Financial Professional

You will need access to the document you would like to share with your financial professional.

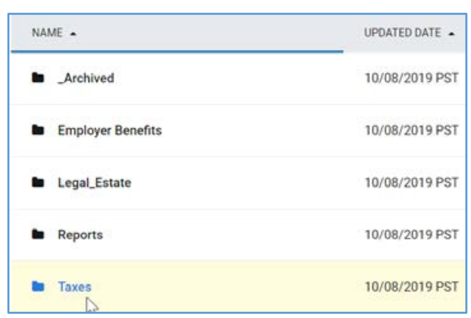
✓ Checklist – How to Share Documents with your Financial Professional

- ☐ From the client portal homepage, click **My Docs.**
- ☐ Click **Document Folders.**

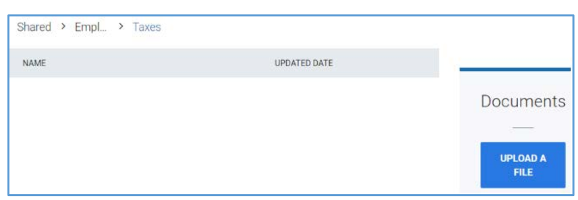


To upload a file to an existing shared folder:

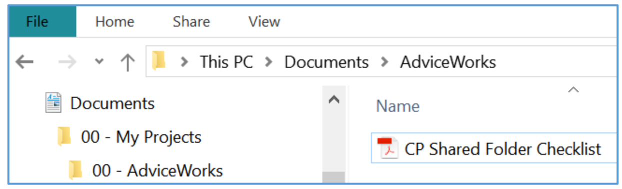
- ☐ Click on the folder name.



- ☐ Click Upload a File button

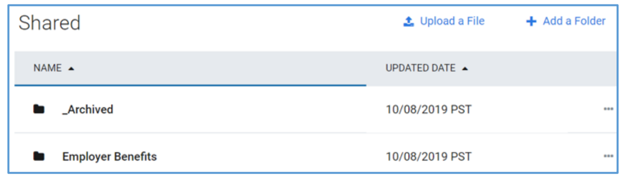


- ☐ Find and select your file.

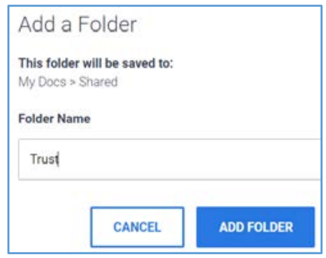


To upload a file to a new shared folder:

- ☐ Click the Add a Folder link.

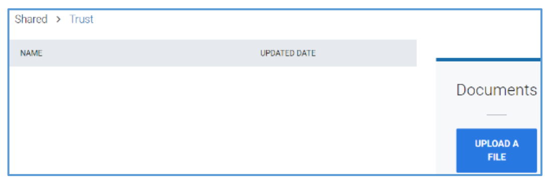


- ☐ Enter the folder name.
- ☐ Click the Add Folder button.

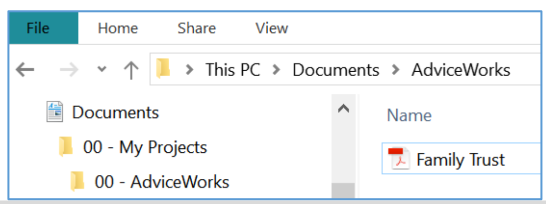


- ☐ Select the new folder

- ☐ Click Upload a File link.
- ☐ Find and select your file.



- ☐ Find and select your file.



Important to Know

When you upload a file or add a new folder, the My Docs screen may take a few minutes to update.

After you upload, copy or delete a file in the shared folder, your financial professional will receive an advisor portal notification.

Your financial professional will be able to access your documents in the shared folder through the advisor portal.

When your financial professional uploads, copies or deletes a file in the shared folder, you will receive a client portal notification.

When your financial professional completes your financial plan, a PDF of the plan will automatically appear under the Reports folder.

The contents in the private folder will not be visible to your financial professional in the Advisor Portal.

Advantages

Keep all your documents for managing your finances accessible in one place.

Shared folder provides a secure digital document storage and collaboration vault alternative to faxing or emailing documents.

My Docs is built behind a multi-factor authentication login process which secures you're your information and documents.