

Vault Overview

The Vault feature of your Wealth Management Portal allows you to safely and securely store important documents and files. This userguide will guide you through the Vault and show you how to upload files. Within your Vault there are two folders you can upload directly into. Depending on the amount of information in your Vault, we may sort the files into additional view-only folders. Most common file types are compatible with the Vault but do note that .exe (executable) files are not supported. Lastly, the individual file size limit is 30mb.

1. To begin, click the **Vault** tab from within your Wealth Management Portal.

The screenshot displays the emX Wealth Management Portal interface. The navigation menu at the top includes Home, Organizer, Goals, Spending, Investments, Vault (highlighted with a red box), and Reports. The user is logged in as Casey and Hannah, with a welcome message and their profile picture. The main dashboard features several key metrics and sections:

- Accounts:** A list of account types with their current balances:

Account Type	Balance
Cash	\$1,275
Credit Cards	-\$1,275
Investments	\$2,101,294
Life Insurance	\$29,000
Loans	-\$326,385
Property	\$1,530,000
Stock Options	\$0
- Net Worth:** \$3,324,634 as of today. Changes: -\$1,846 this month, +\$208,417 year to date.
- Investments:** \$2,275,891 as of today. Changes: -\$1,124 Change, -0.05% Change.
- Goals:** A section titled "Goals as of today" with a "View All" link. It contains two goal cards:
 - Retirement:** 2032 - 2070. Projected Funding: 39 of 39 years.
 - Home Improvement - Bath Remodel:** 2027. Projected Funding: \$16,728 of \$16,728.

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- The two folders you can upload files into are **My Documents** and **Shared Documents**. Use **My Documents** to store any personal files and **Shared Documents** should be used when uploading files you want to remain visible to our team.

The screenshot shows the 'Vault' interface. At the top right, there are buttons for 'New Folder' and 'Upload Files'. Below the header, there is a search bar labeled 'search by name' and a 'Search' button. The main content area is a table with columns for 'Name', 'Size', 'Shared', and 'Created'. Two folders are listed: 'My Documents' (2 Files, shared, created 5/9/2016 at 10:07 am) and 'Shared Documents' (9 Files, shared, created 5/9/2016 at 10:07 am). Both folder names and their corresponding folder icons are highlighted with a red box.

Name	Size	Shared	Created
My Documents	2 Files	✔	5/9/2016 at 10:07 am
Shared Documents	9 Files	✔	5/9/2016 at 10:07 am

- Next, click into a folder. Within both the My Documents and Shared Documents folders, you will have the ability to create Sub-Folders using the **New Folder** button. These will allow you to further organize your files.

The screenshot shows the 'Vault' interface with the 'Shared Documents' folder selected. At the top right, the 'New Folder' button is highlighted with a red box. Below the header, there is a search bar labeled 'search by name' and a 'Search' button. The main content area is a table with columns for 'Name', 'Size', 'Shared', and 'Created'. Two items are listed: 'Organizer' (8 Files, shared, created 6/6/2016 at 2:03 pm) and 'picture.jpg' (5.63 KB, shared, created 2/2/2018 at 5:24 pm). Both items have an 'Actions' dropdown menu. Below the table, there is a usage summary: 'Usage: 424.11 KB (76.66 KB are private)'. At the bottom, there is a disclaimer: 'The ability to electronically retrieve or store your documents is provided for your convenience. These documents are not original, legal documents or official records nor are these documents intended to replace your original, legal documents or official records. Neither your representative nor any of their affiliates, agents, or employees provide legal, tax, or accounting advice. Please refer to the Terms of Service for additional information on Aggregation Services.'

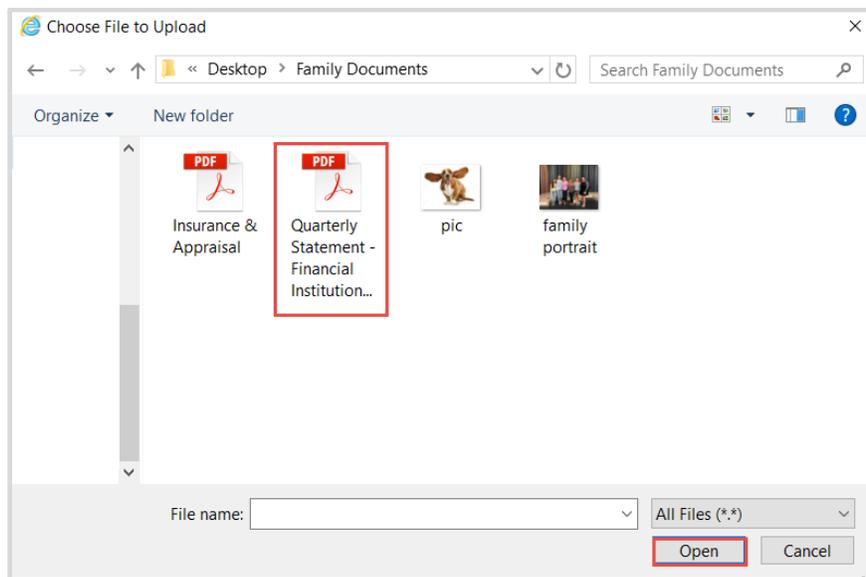
Name	Size	Shared	Created
Organizer	8 Files	✔	6/6/2016 at 2:03 pm
picture.jpg	5.63 KB	✔	2/2/2018 at 5:24 pm

Usage: 424.11 KB (76.66 KB are private)

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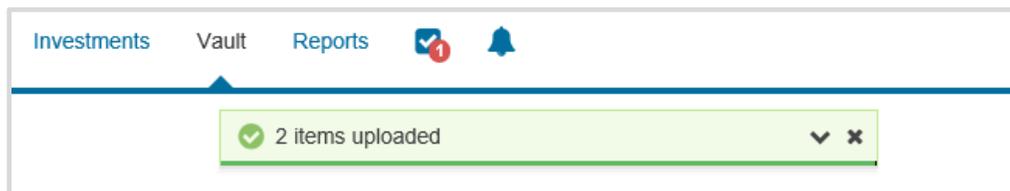
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- To begin uploading your files, click **Upload Files**. Your browser will open a modal that allows you to pick and choose documents to upload from your desktop. Browse your desktop, select a file to upload. To select multiple, hold down the SHIFT key while selecting the files individually. When ready, click **Done**.



Note: each individual file cannot exceed 30mb in size.

Once files are successfully uploaded, you will see a green success message at the top of your portal.



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- Click on a file name to open it from your browser. Each file in your vault will have an **Actions** drop-down. This allows you to **copy**, **move** into a different folder or subfolder (within My Docs or Shared Docs), **rename**, or **delete** a file. **Note:** deleted files cannot be recovered.

Name ^	Size	Shared	Created
 Organizer	8 Files		6/6/2016 at 2:03 pm Actions ^
 picture.jpg	5.63 KB		2/2/2018 at 5:24 pm Actions ^
 Quarterly Statement - Financial Institution 321.pdf	699.27 KB		2/2/2018 at 5:24 pm Actions ^

Usage: 1.1 MB (76.66 KB are private)

- Copy
- Move
- Rename
- Delete