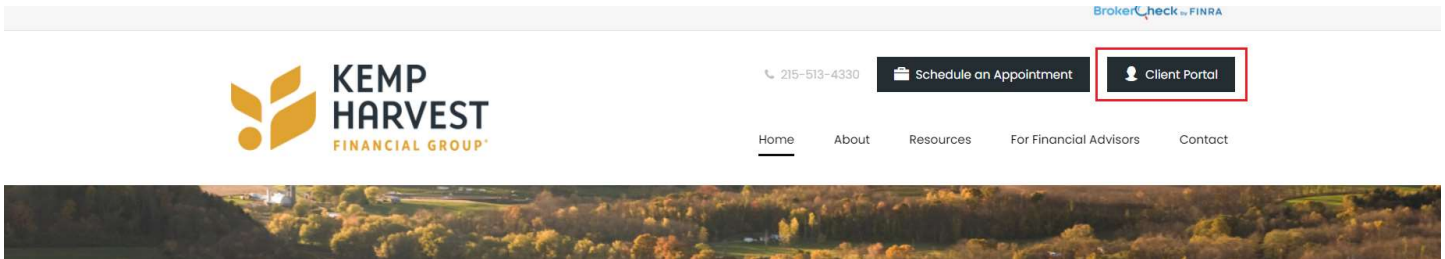


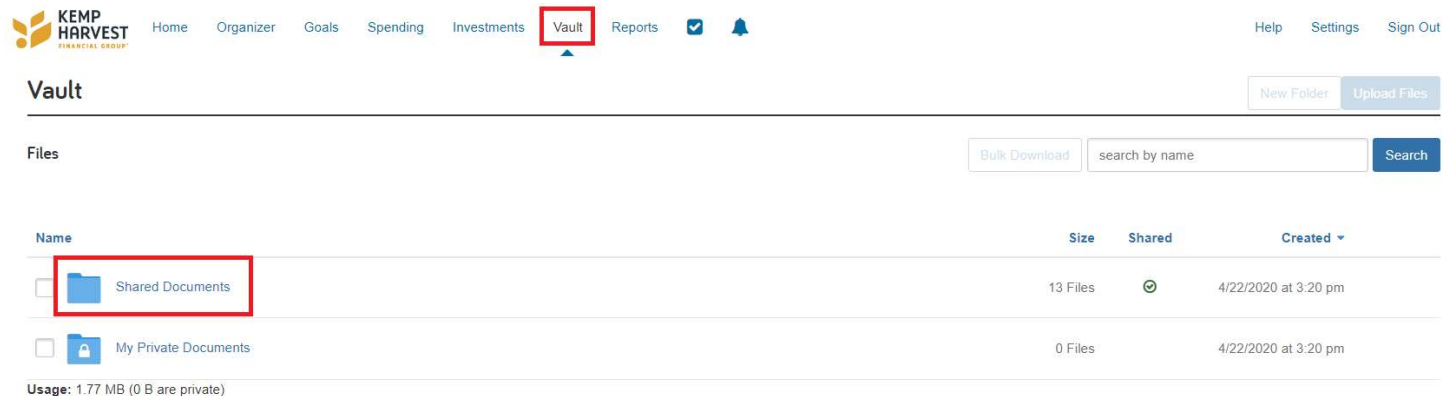
Client Portal Instructions: Vault Upload

Should you need any assistance, call us at 215-513-4330.

1. Login to your client portal. Visit <https://www.kempharvest.com>, click on the blue **Client Portal** button in the top right, then Click here to proceed.



2. From your Home Page, click on the **Vault** tab. Use My Private Documents to store any personal files and use **Shared Documents** when uploading files for Kemp Harvest Financial to view and have access to. Click on the **Shared Documents** folder.



3. Once you are in Shared Documents, you will see a blue **Upload** button in the top right. To upload files, click **Upload** and select **Files**. Your browser will open a modal that allows you to pick and choose documents to upload. Select the file(s) you wish to upload (To select multiple files, hold down the Shift key while selecting the files individually). When ready, click **Open** or **Upload**.

KEMP HARVEST FINANCIAL GROUP®

331 Ruth Road, Harleysville PA 19438 | Direct 215.513.4330 Fax 215.513.3220 | www.kempharvest.com
Securities and advisory services offered through LPL Financial, a Registered Investment Advisor. Member FINRA/SIPC.



Vault

New Folder **Upload**

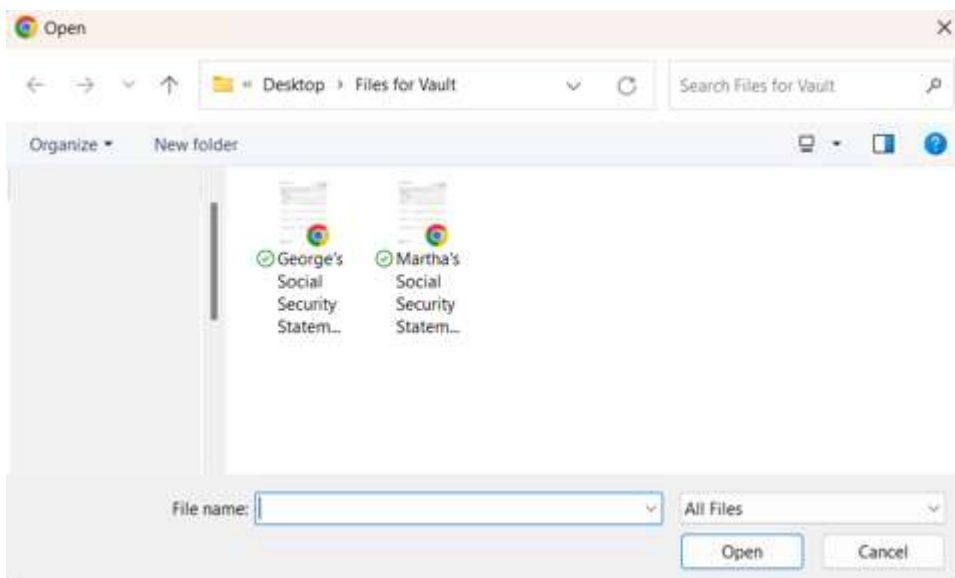
Files > Shared Documents

Bulk Download search by name Search

Name Size Shared Created

Usage: 0 B (0 B are private)

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 Use for additional information on Aggregation Services.



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



Vault

1 item uploaded

New Folder Upload

Files > Shared Documents

Bulk Download search by name Search

Name Size Shared Created

<input type="checkbox"/>		George's Social Security Statement.pdf	127.61 KB		9/6/2023 at 10:38 am	Actions
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Usage: 607.11 KB (0 B are private)

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