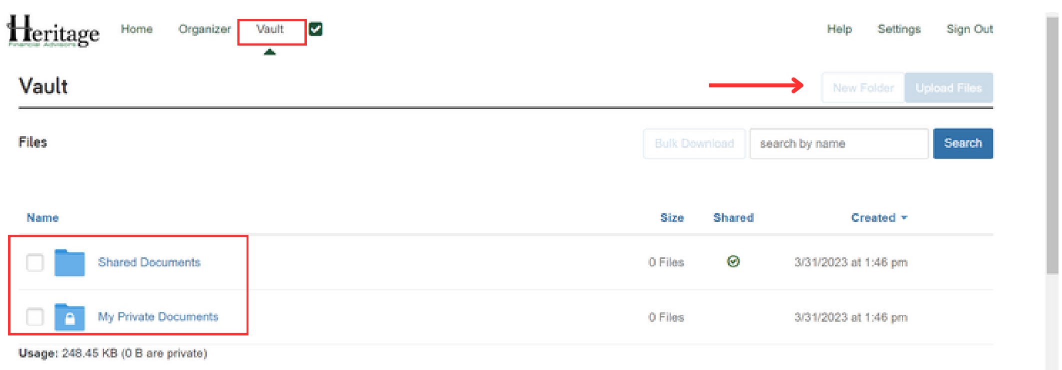
# How to Upload Your Tax Return to Your Vault

The Vault feature in your Personal Financial Website allows you to store important documents and files safely and securely. This user guide will show you how to upload your tax return securely to your vault.

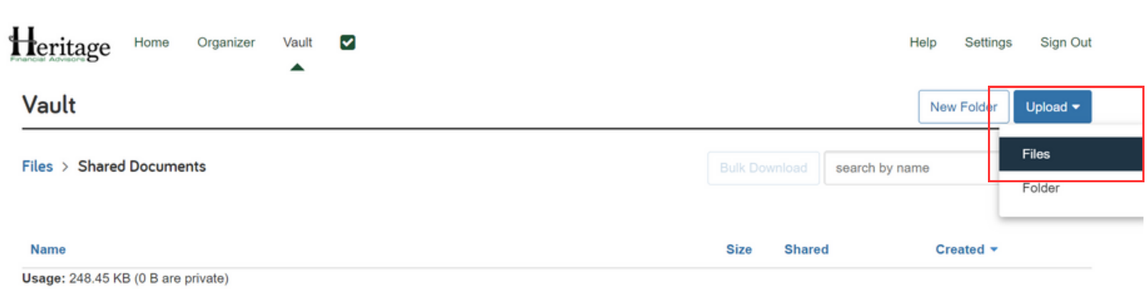
**Please Note:**
- Within your Vault there are two folders you can upload directly into – they are titled My Private Documents and Shared Documents.
- Most file types are compatible, however .exe (executable) files are not supported.
- The individual file size upload limit is 30MB.

1. Log into your Personal Financial Website. Click the Vault tab from the top navigation bar. Use Shared Documents when uploading your tax return.

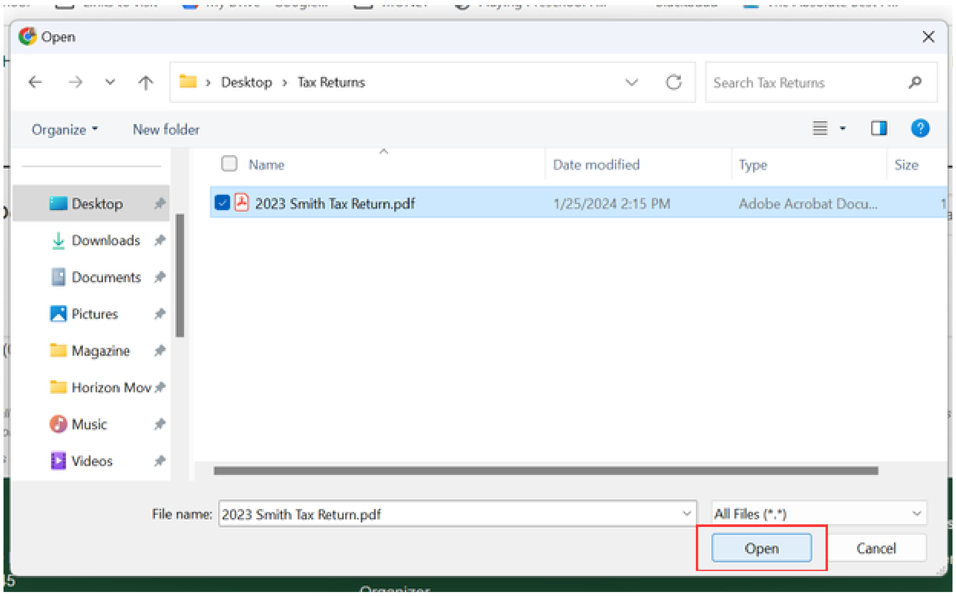



***Note:** The New Folder and Upload Files buttons in the top right will remain grayed out until you have clicked into either the My Private Documents or Shared Documents folders.*

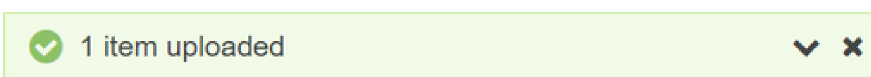
2. Once you are in the Shared Documents folder, click Upload and select Files or Folder.



3. Your browser will open a new window that allows you to choose files or a folder to upload from your desktop. To select multiple files, hold down the Shift key while selecting the files individually. When ready, click Open or Upload. Depending on your browser, you may need to confirm the upload again.




4. Once the files are successfully uploaded, you will see a green banner confirming the upload at the top of your Personal Financial Website.




5. Email Chris (chris@heritagefinancialadvisors.com) to let him know that your return has been uploaded to the Vault.