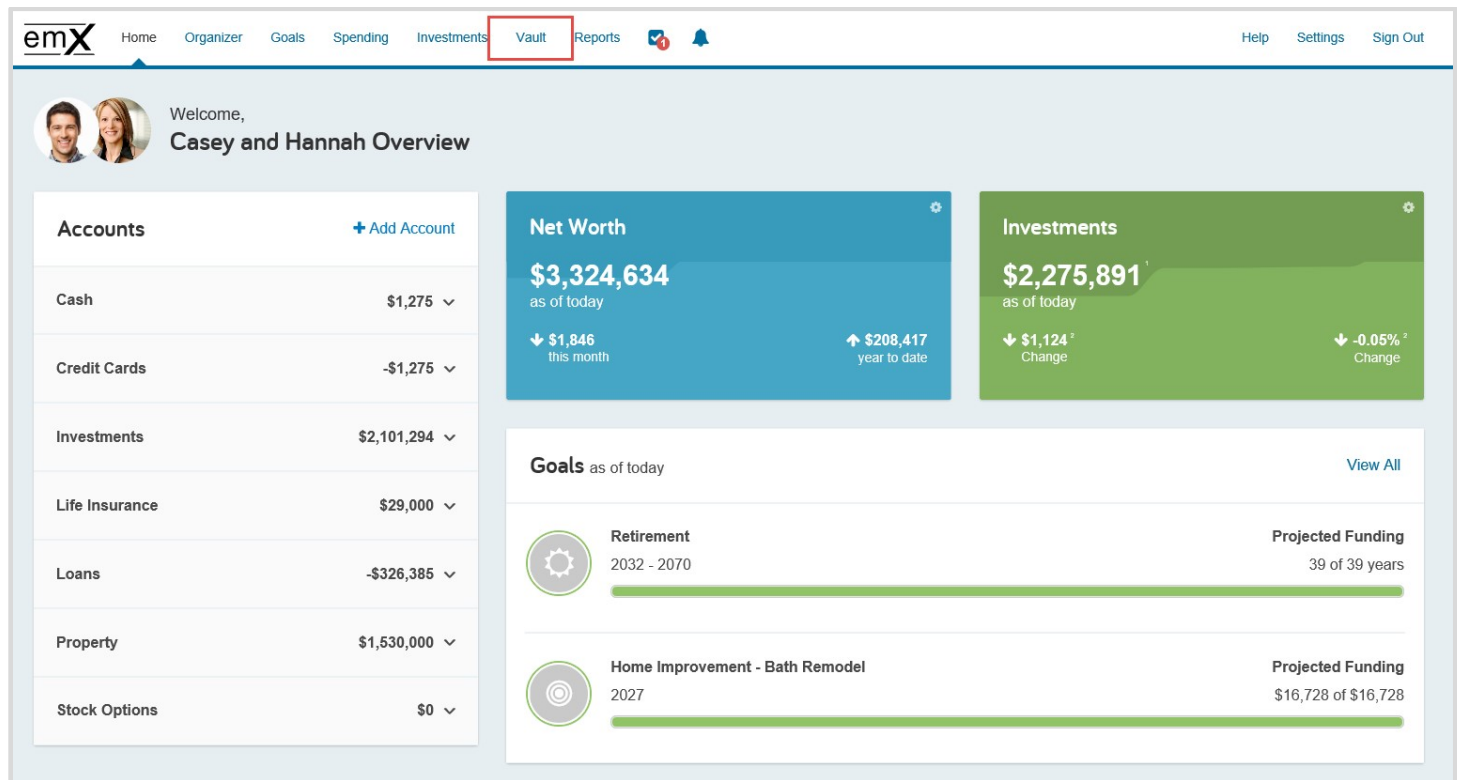


Vault Overview

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.



Vault Overview

- 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.

Vault



New Folder

Upload Files

Files

search by name

Search

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.

Vault





New Folder

Upload Files

Files > Shared Documents

search by name

Search

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 ▾

Usage: 424.11 KB (76.66 KB are private)

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Please refer to the Terms of Service for additional information on Aggregation Services.

Vault Overview

- 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**.

Vault

New FolderUpload Files

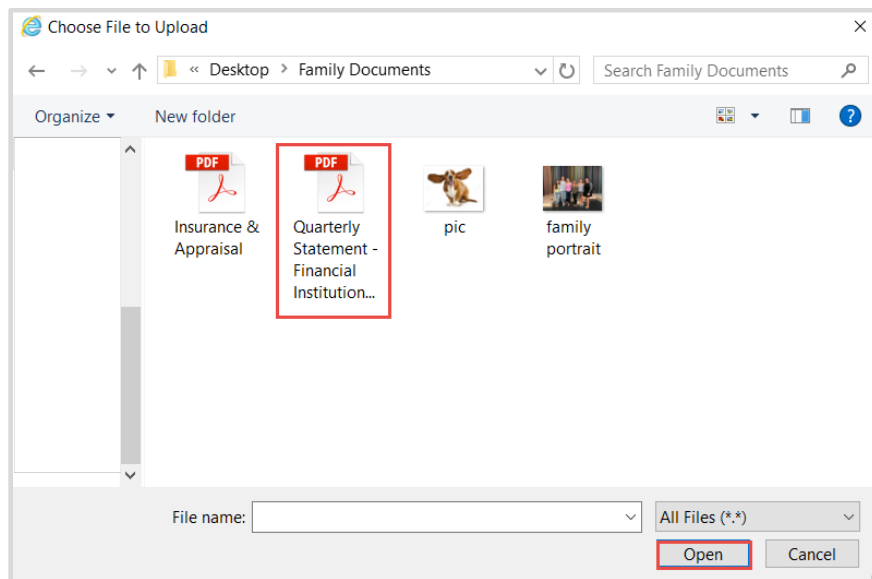
Files > Shared Documents

search by nameSearch

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

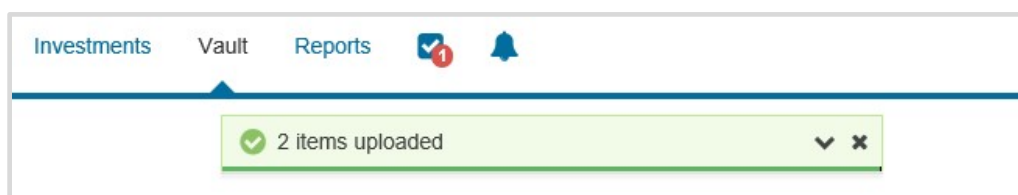
Usage: 424.11 KB (76.66 KB are private)

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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.



Vault Overview

5. 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](#)