



Guide to Using Your Online Vault



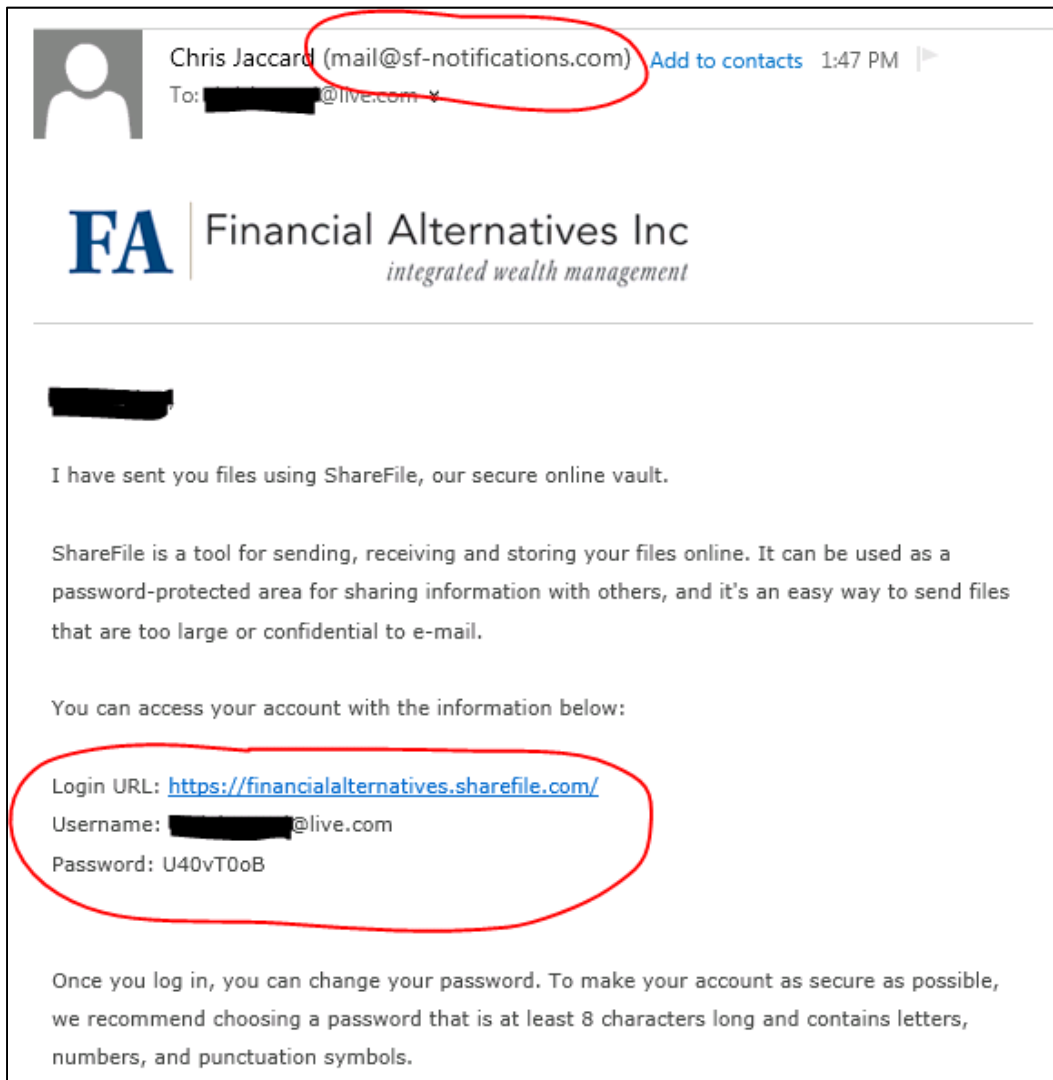
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Accessing Your Vault

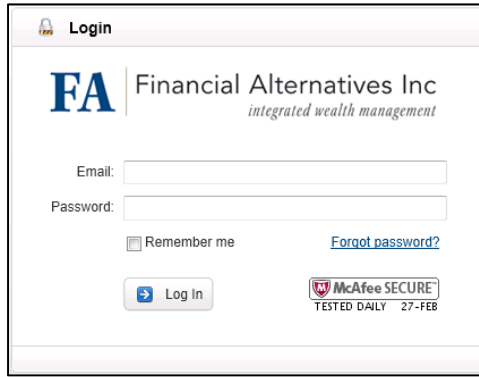
Open the Welcome Email

- You will get an email from mail@sf-notifications.com with the subject: "ShareFile Login Information".
- Your Username is your email address.
- Your temporary Password is shown in the welcome email.



Login to the Site

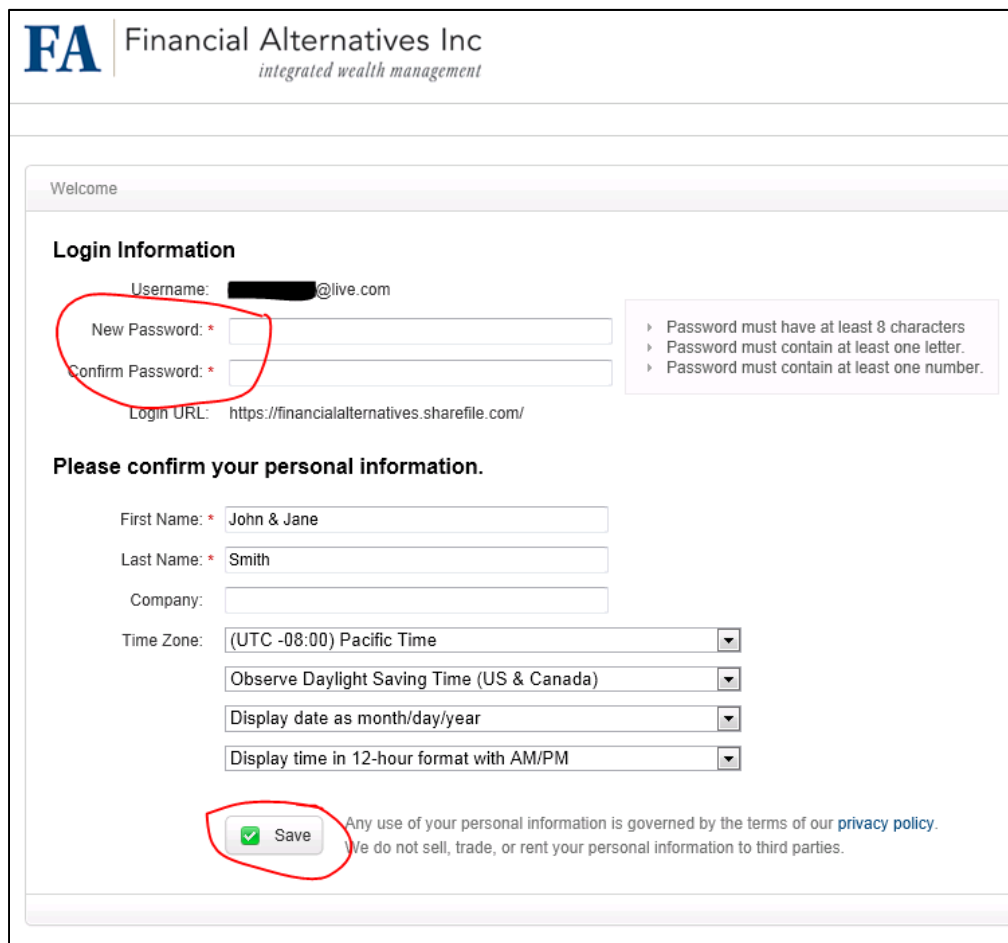
- Click the link in the email to go to <https://financialalternatives.sharefile.com>
 - Note: You can also click the "Vault Login" link at the top right portion of our website.
- Enter Email and your temporary Password.
- The Login page should look like this:



The screenshot shows the login page for Financial Alternatives Inc. The page features the company logo (FA) and tagline "integrated wealth management". Below the logo are input fields for "Email:" and "Password:". There is a "Remember me" checkbox and a "Forgot password?" link. A "Log In" button is located at the bottom left. On the bottom right, there is a McAfee SECURE logo with the text "TESTED DAILY 27-FEB".

Update Your Password

- Enter your new password and click Save.



The screenshot shows the "Update Your Password" page for Financial Alternatives Inc. The page features the company logo and tagline. Below the logo is a "Welcome" message. The main section is titled "Login Information" and contains the following fields:

- Username: [redacted]@live.com
- New Password: * [input field]
- Confirm Password: * [input field]
- Login URL: <https://financialalternatives.sharefile.com/>

To the right of the password fields is a list of password requirements:

- › Password must have at least 8 characters
- › Password must contain at least one letter.
- › Password must contain at least one number.

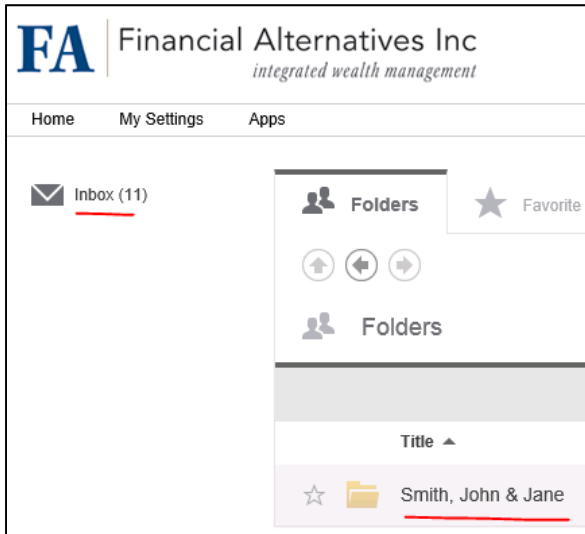
Below the "Login Information" section is a section titled "Please confirm your personal information." with the following fields:

- First Name: * John & Jane
- Last Name: * Smith
- Company: [input field]
- Time Zone: (UTC -08:00) Pacific Time
- Observe Daylight Saving Time (US & Canada)
- Display date as month/day/year
- Display time in 12-hour format with AM/PM

At the bottom of the page is a "Save" button with a green checkmark icon. To the right of the button is a disclaimer: "Any use of your personal information is governed by the terms of our [privacy policy](#). We do not sell, trade, or rent your personal information to third parties."

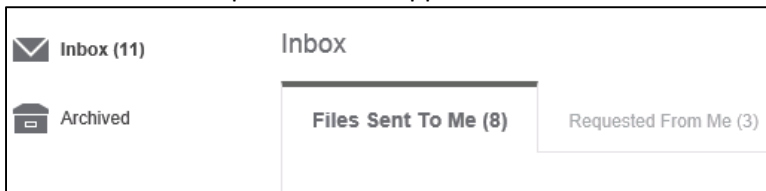
Your Vault Layout

- After you login, you will see that your vault consists of **1)** an inbox, and **2)** a client folder.



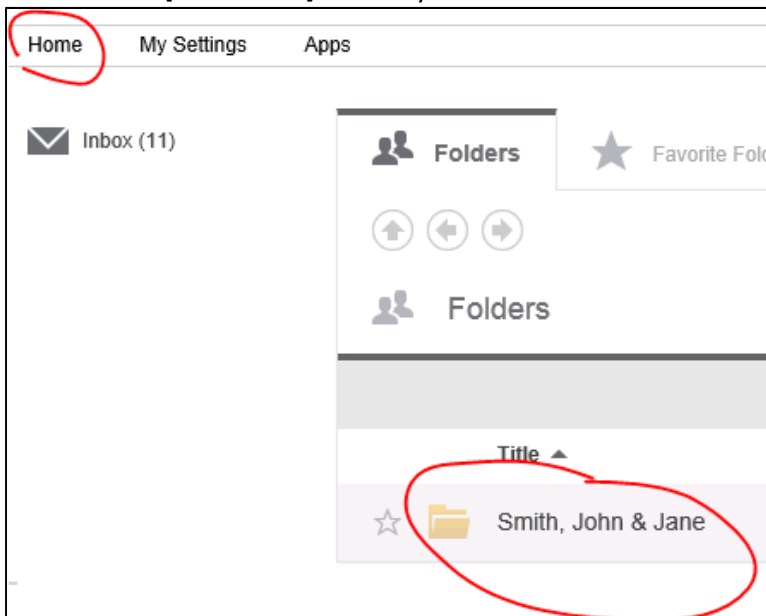
Inbox (for email attachments and uploads)

- Only files we have sent you or requested **by email** “attachment” will show up here.
- Your investment reports will not appear in this folder.



Client Folder (for reports and planning docs)

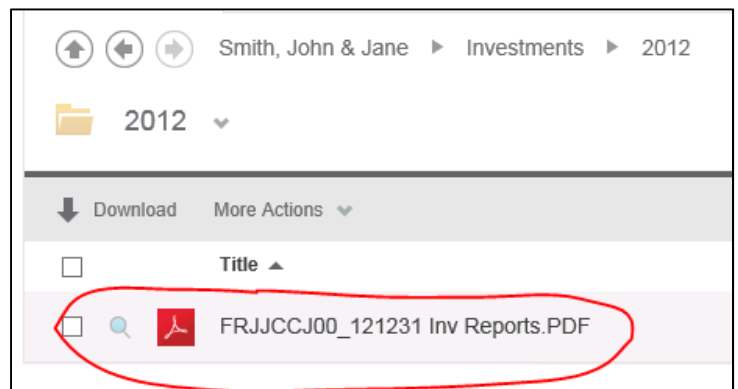
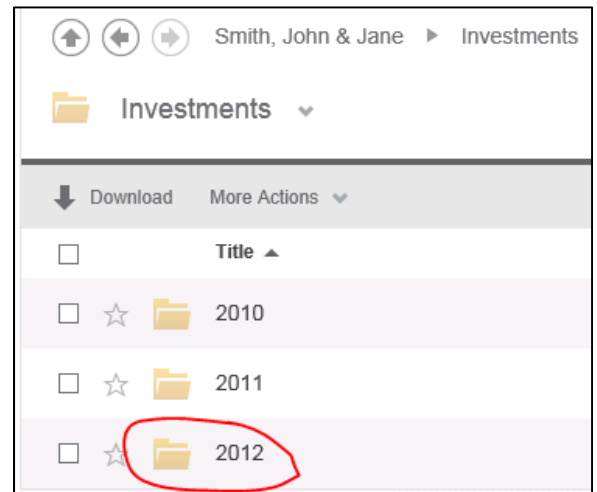
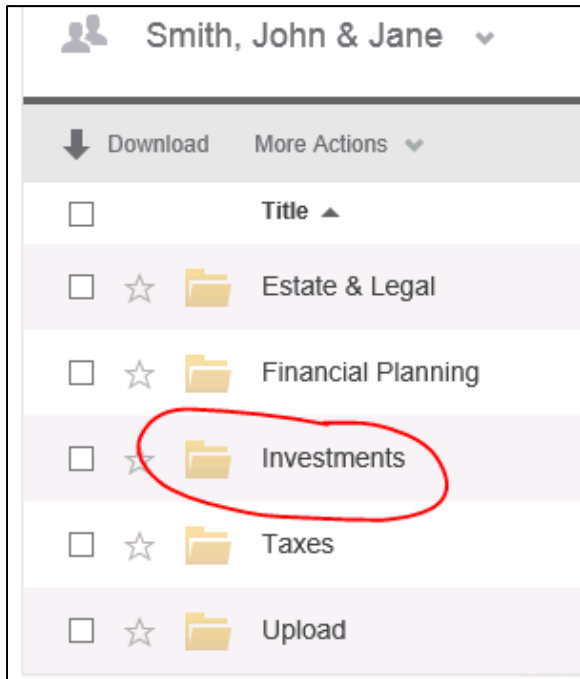
- Click Home > [Your Name] to view your client folder



Using Your Vault

View Your Investment Reports

- Your quarterly investment reports are filed under the Investments folder and organized by year.
 - Just click the Investments folder then the year to view your reports.

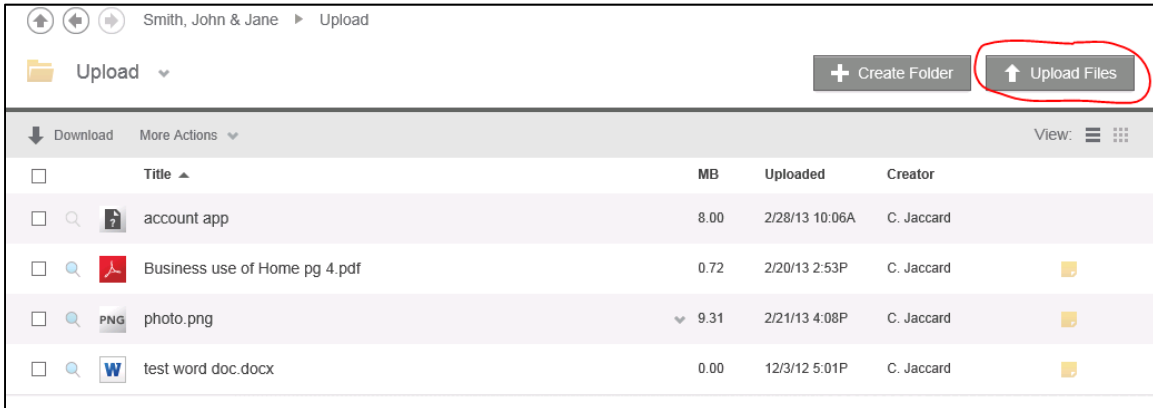


Collaborate with Your Tax Preparer

- We can use the Taxes folder as a secure way to allow you and your CPA (or other tax preparer) to access important tax documents such as 1099s, K-1s, etc.
- We can also allow your CPA to upload draft returns without the hassle or security concerns of email.

Upload Files

- Easily upload by selecting the folder you want to upload to and clicking the Upload Files link, then choose files from your computer. You later can move or delete any files you upload.
 - *Note:* We can also email you a link allowing you to quickly upload a file.
- We created your "Upload" folder so we have a place to share documents that don't fit another folder (such as account applications, forms, questionnaires, etc.).



Upload Files to "Upload" Folder

To upload a file, click Choose Files. Select files from the pop-up menu, or drag files from your computer on to the box. To upload multiple files at once, hold down the Shift or Control key as you select files.

Note: Folders cannot be uploaded with this tool. To upload a folder, switch to [Java Uploader](#).

If you have trouble uploading files, you can try using [Flash uploader](#) or [Standard Uploader](#).

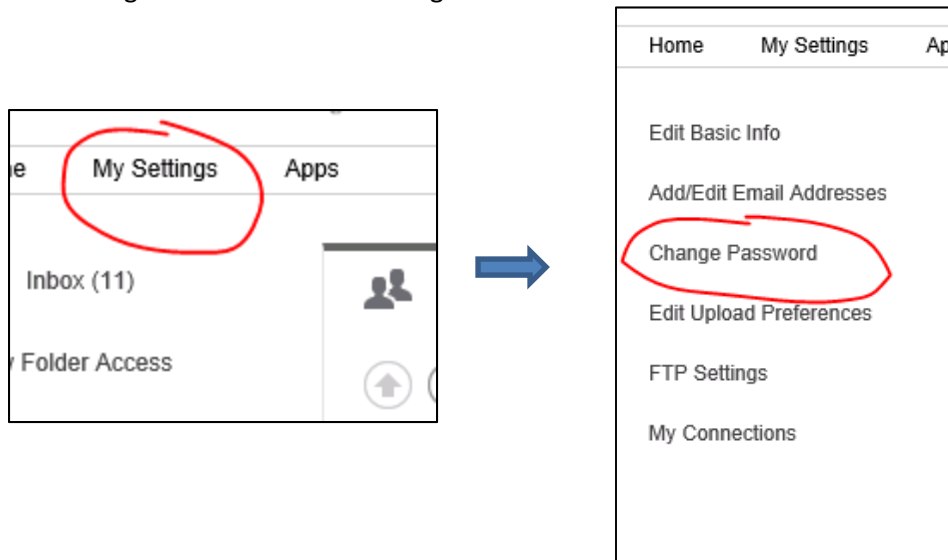
or drag and drop files

DRAG FILES HERE

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Change Your Password in the Future

- Click the My Settings link at the top right portion of the ShareFile site.
- Click the Change Password link on the right side bar.



ShareFile Apps

- Citrix ShareFile Apps are available for almost all smartphones, tablets, and computers.
- *Power User Example:* In a pinch, you can take a picture of a signed account application and securely upload it from your iPhone.

