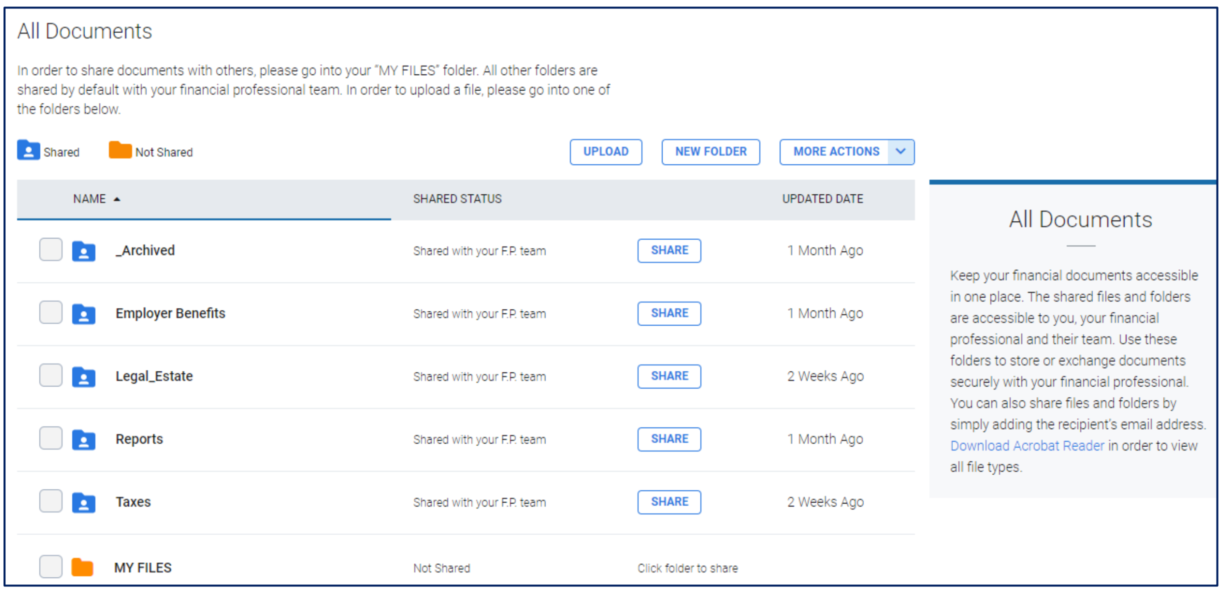
CLIENT PORTAL: Sharing Documents

Description

My Documents provides a secure digital document storage and collaboration vault to share information with your financial professionals and external trusted third parties. This avoids the need for you to have to download and email sensitive documentation.

My Documents homepage displays files and folders that are shared by default (public) with your financial professional. Your private files and folders are found in the MY FILES folder.

You can share files and/or folders with trusted partners not enrolled in AdviceWorks. They will be redirected to create a secure account and access files and folders shared with them via Box.com. You can authorize third parties like tax preparers or estate planners to have access to either files or entire folders in My Documents.



First Things First

You will need access to the document you would like to share from your device.

To share a folder/file with a trusted third party, you will need a valid email address for the third party.

AdviceWorks will send an email to the third party to enroll in Box.com.

Important to Know

Keep all your documents for managing your finances accessible in one place.

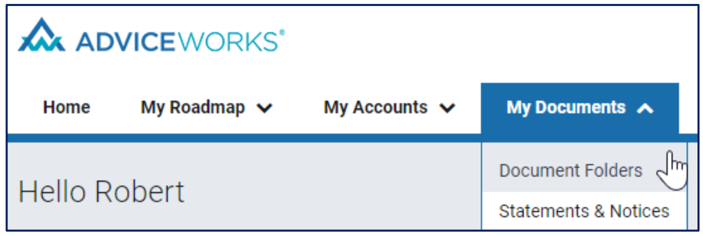
My Documents is built behind a multi-factor authentication login process which secures your information and documents.

Pre-defined shared folders are setup to provide guidance to the types of documents to share.

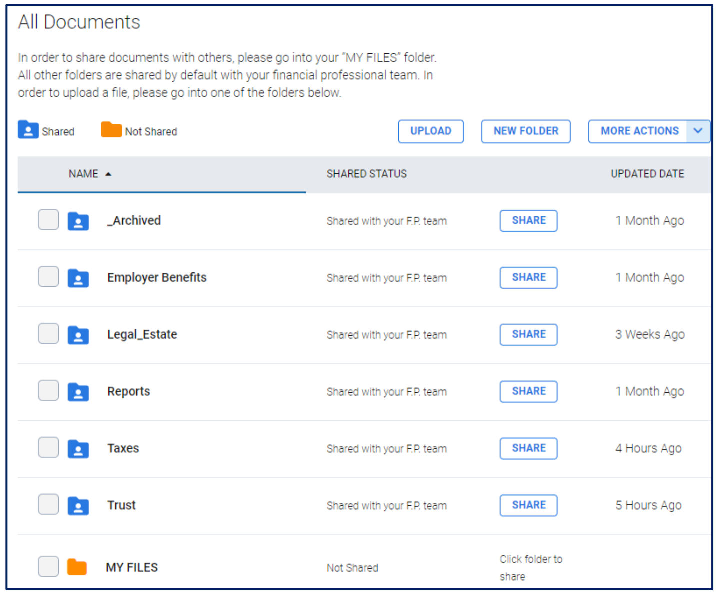
AdviceWorks automatically notifies your financial professional when you upload, move, copy, rename, or delete a shared folder/file.

✓ Sharing Documents

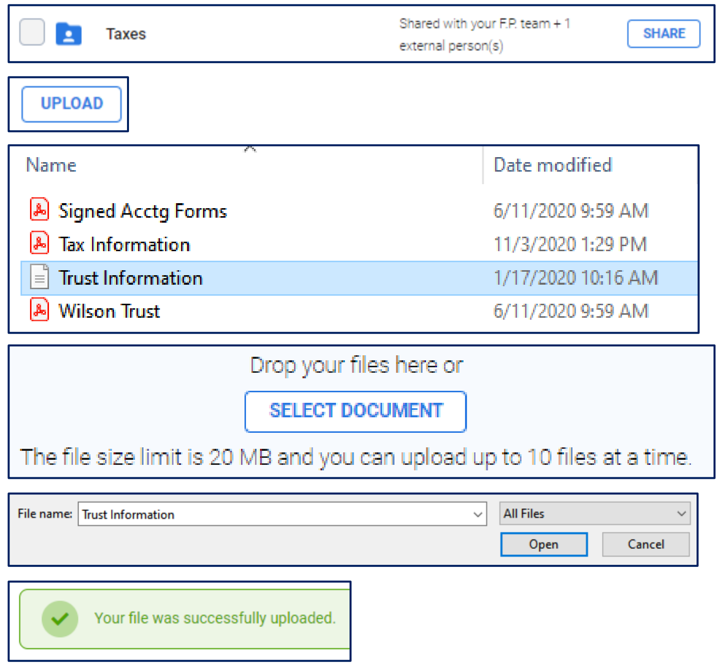
1. From the Client Portal home page, click **My Documents** then click **Document Folders**.



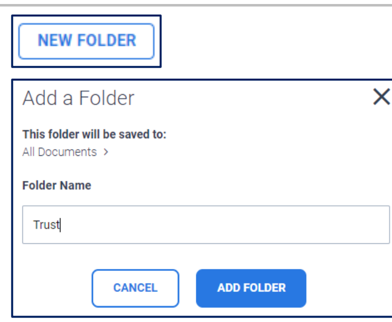
2. Review **All Documents.**
   - The blue folders/files are shared (public).
   - The orange folders/files are not shared (private).
   - Pre-defined shared folders are setup to provide guidance to the types of documents to share.
   - Click on the **Folder Name** to view the contents of the folder.
   - Click **Upload** to upload files.
   - Click **New Folder** to create a new folder.
   - Click **More Actions** for additional actions to perform on folders/files.
     - Download
     - Delete
     - Move or Copy
     - Rename
   - **Shared Status** lets you know who the folder/file is shared with.
     - Not Shared
     - Shared with your F.P. team
     - Shared with external persons
     - Shared with your F.P. team + external person(s)
   - The **Share** button allows you to share the folder and its contents with your financial professional or trusted third parties.
   - **Update Date** provides the date the folder/file was shared.
   - **My Files** is a private folder that is not shared.



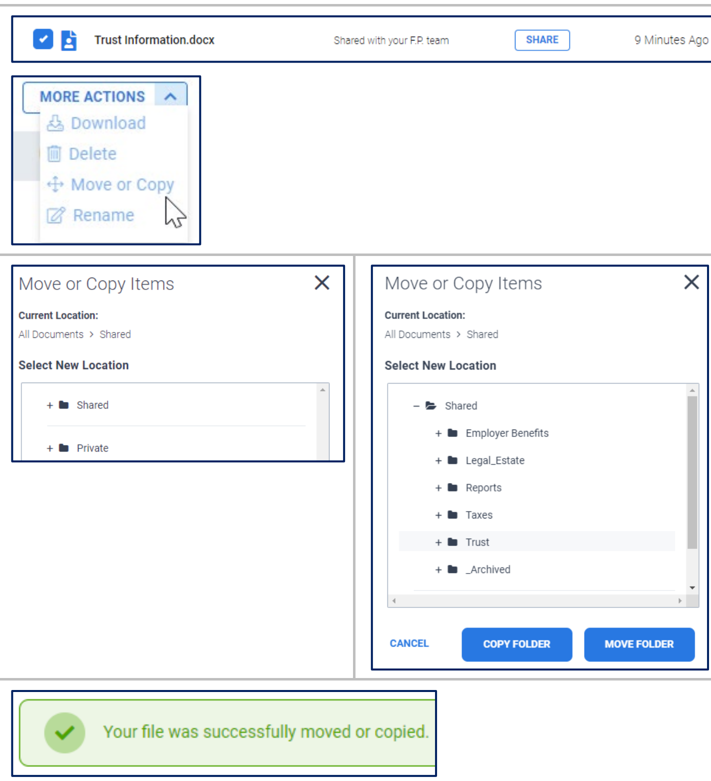
3. To **Upload a Document**,
   - Select your folder.
   - Click **Upload** and select your document OR
     Drop your files in **Select Document**.
   - Find and select your document.
   - Click **Open**.
   - You will receive a confirmation message that your file was successfully uploaded.
   - AdviceWorks automatically notifies your financial professional when you upload a shared file.



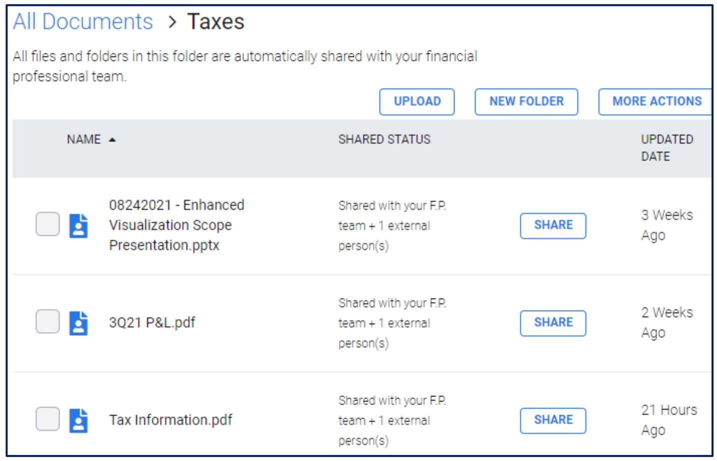
4. To **Create a New Folder**,
   - Click **New Folder**.
   - Enter the Folder Name.
   - Click **Add Folder**.
   - AdviceWorks automatically notifies your financial professional when you create a shared folder.

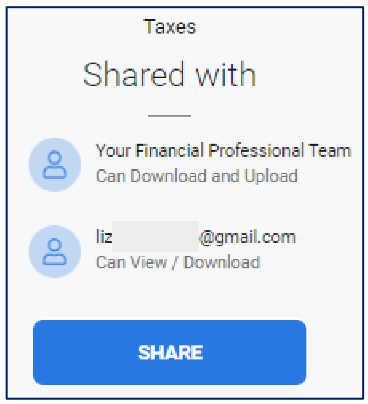


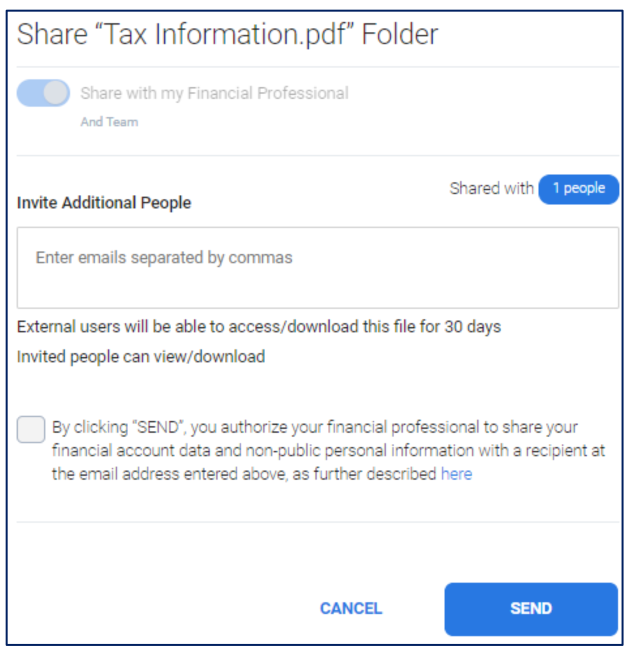
5. To **Move a Folder/file**,
   - Select your folder/file by checking the box next to it.
   - Click **More Actions**.
   - Click **Move or Copy**.
   - Select the **New Location**: Shared or Private section.
   - Select the **folder**.
   - Click **Move Folder**.
   - You will receive a confirmation message that your file was successfully moved or copied.
   - AdviceWorks automatically notifies your financial professional when you move or copy a shared folder/file.

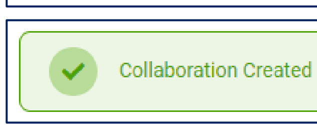


6. **Shared Folder** features.
   - To **view** the contents of a Shared Folder, click on the Folder Name.
   - All contents within the folder will display.
   - Click on the File Name to preview or download the file.
   - The right hand panel displays who the folder is **Shared with** and their folder permissions.
     - Download
     - Upload
     - View
   - Any document uploaded to a Shared Folder will **automatically** be shared with the users displayed in **Shared with**.
   - To **share a file** with additional people,
     - Click Share next to the file/folder.
     - Enter emails of additional people.
     - Click the box to authorize sharing.
     - Click Send.
     - You will receive a confirmation message that collaboration was created.
   - To **share a folder** with additional people,
     - Click Share in the **Shared with** panel.
     - Enter emails of additional people.
     - Click the box to authorize sharing.
     - Click Send.
     - You will receive a confirmation message that collaboration was created.
   - AdviceWorks automatically notifies your financial professional and additional people when you share a folder/file.

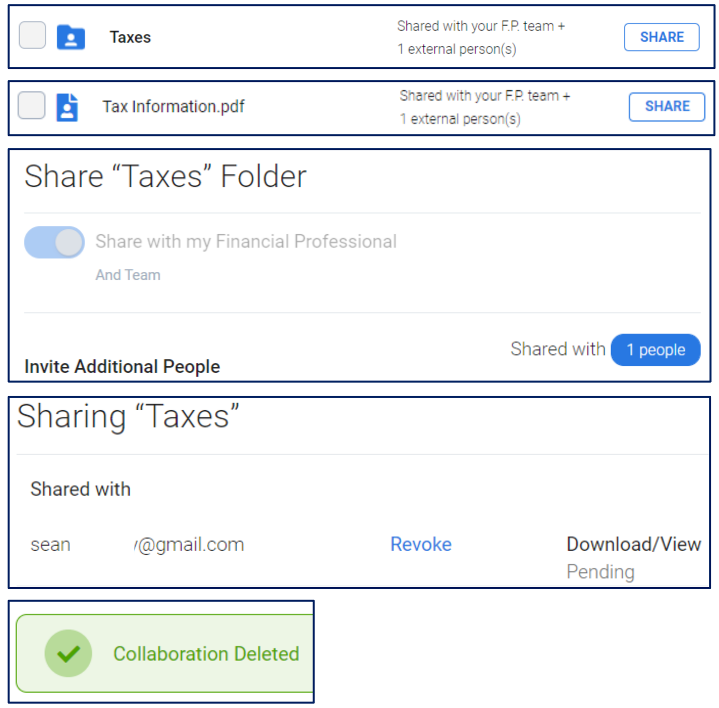




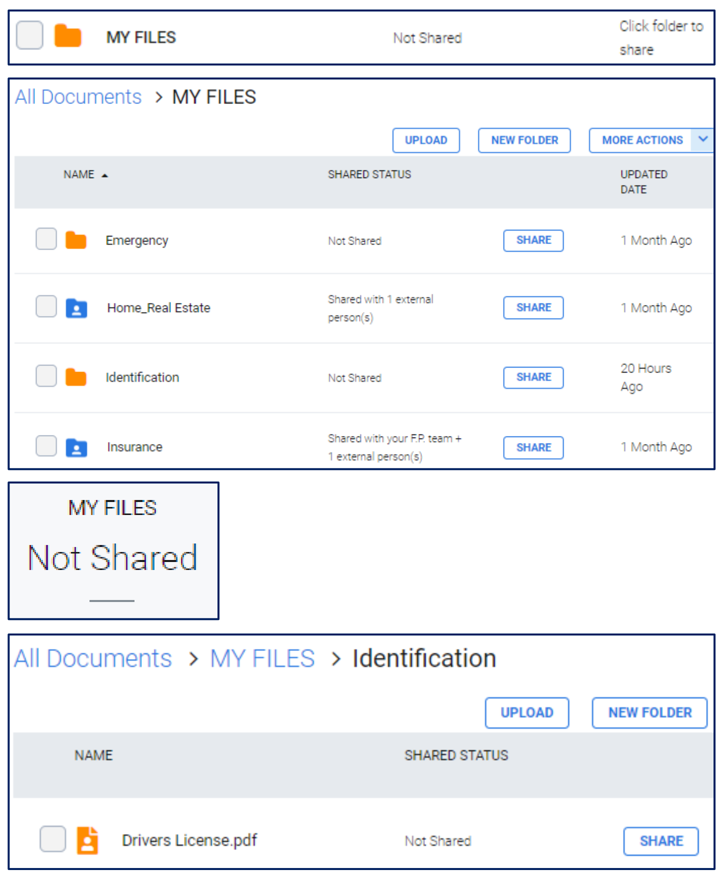




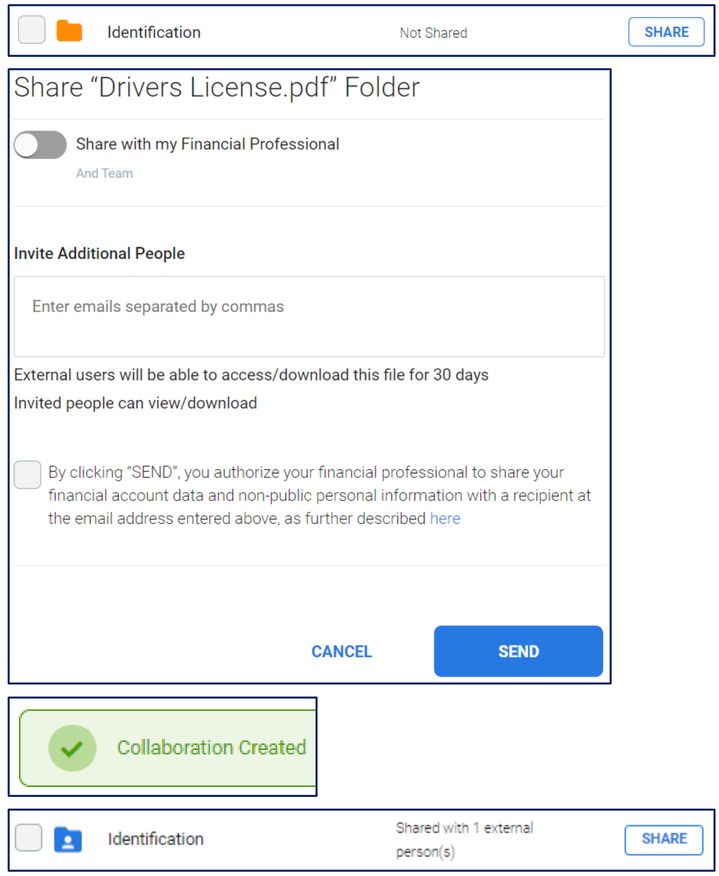
7. To **Revoke** access to **Shared Folder/File**,
   - Click the Shared Folder.
   - Click the **Share** button next to the shared folder/file.
   - Click the **Share with # people** button.
   - Click **Revoke**.
   - You will receive a confirmation message that collaboration was deleted.



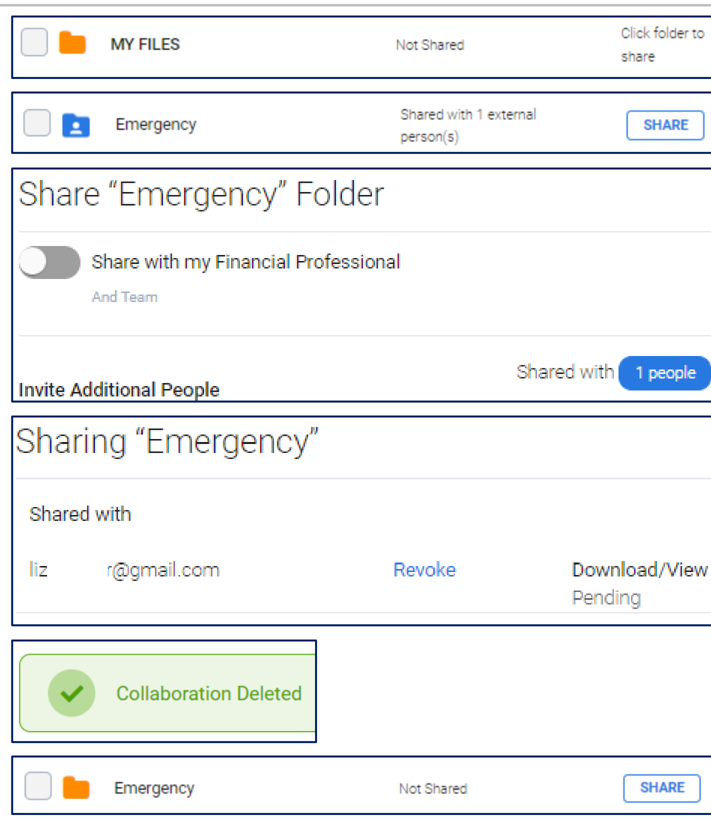
8. **MY FILES** features.
   - **MY FILES** is a private folder specifically for Clients. Advisors do **NOT** see this folder in the Advisor Portal.
   - Click on **MY FILES** to view the contents.
   - Contents in **MY FILES** may contain public and private folders/files.
   - **Shared Status** lets you know who the folder/file is shared with.
     - Not Shared
     - Shared with your F.P. team
     - Shared with external persons
     - Shared with your F.P. team + external person(s)
   - The right hand panel shows that **MY FILES** is **Not Shared**.
   - Click on the **folder/file name** (public or private) to **view** the contents.



9. To Share a folder/file from MY FILES,
   - Click on the folder/file name.
   - Click Share next to the folder/file.
   - Slide the radio button to the right to share with your Financial Professional and Team.
   - Enter emails to invite additional people.
   - Click the box to authorize sharing.
   - Click Send.
   - You will receive a confirmation message that collaboration was created.
   - AdviceWorks automatically notifies your financial professional and additional people when you share a folder/file.
   - If the folder/file was private, upon sharing it will turn to a public shared folder/file.



10. To Revoke access to MY FILES,
    - Click the MY FILES folder.
    - Click the Share button next to the shared folder/file.
    - Click the Share with # people button.
    - Click Revoke.
    - You will receive a confirmation message that collaboration was deleted.
    - If the folder/file was public, upon revoking access, it may turn to private with a Not Shared status.



11. Box.com process.
   - Third parties will receive a box email to have instant access to the folder/file shared with them.
   - *If applicable*, click Accept Invite. Third Parties will be invited to Create a Box Account.
     - Full Name
     - Email Address
     - Password
     - Confirm Password
     - Phone Number
     - Live in European Economic Area
     - Agree to Box's Terms of Service
     - Click Submit.
     - A confirmation email will be sent to the third party to complete their Box signup.
     - Within Box, click Get Started.
   - *If applicable*, click the folder name or Go to Folder. Enter your login credentials.
   - All files contained in the shared folder are displayed.
   - Click the file name to view or download.
   - Users are reminded that after 30 days, temporary access will automatically be removed.
   - The right hand panel displays the sharing properties.
   - Users will **not** be able to upload information to the shared folder on box.com.