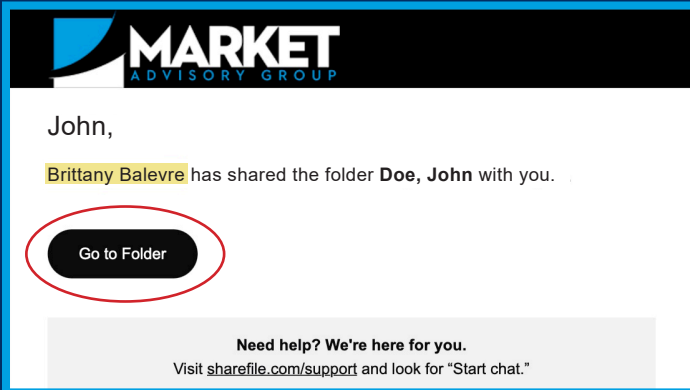


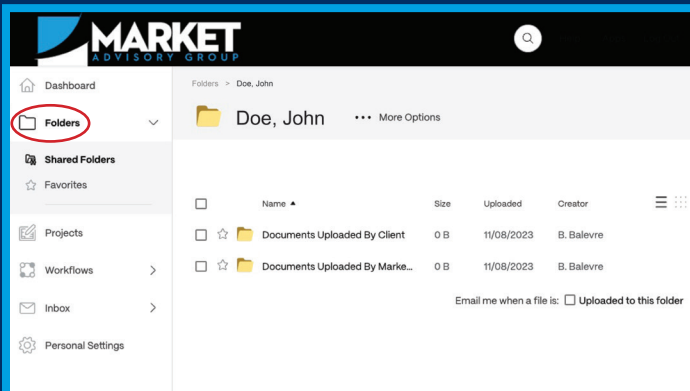
STEP 1



You'll be sent an e-mail with a link to access the portal. All documents you will need can be found there. Select "Go to Folder" to get started.

Create a password when you first login. Your username will be your e-mail.

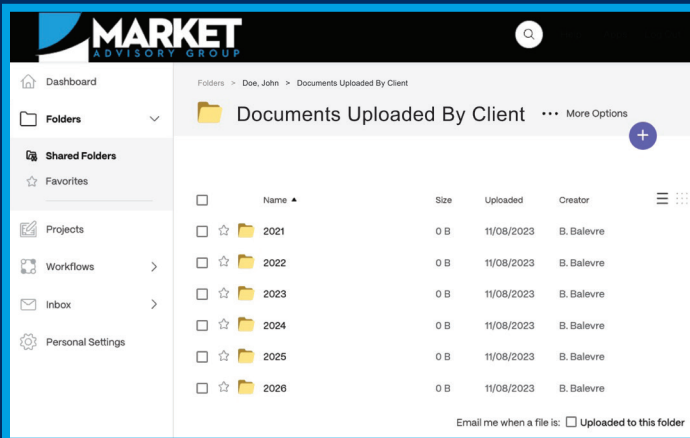
STEP 2



This is the portal. The "Folders" section is the only section you will need to use. You will see two folders you can access.

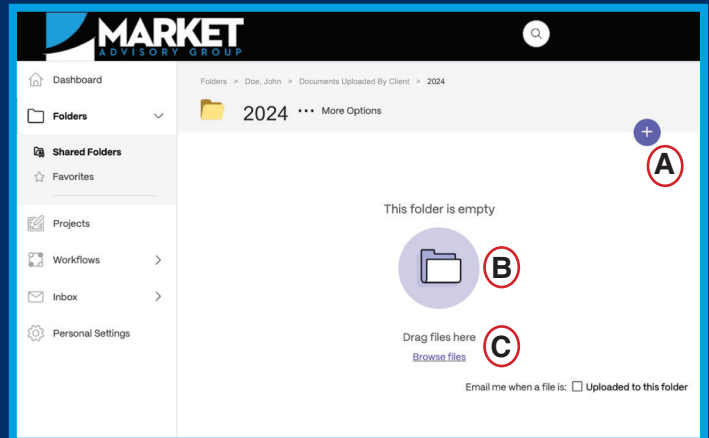
1. "Documents Uploaded By Client" - this is the folder you will use to upload documents for us to see. See Step 3 for instructions.
2. "Documents Uploaded By Market Advisory Group" - Market Advisory Group will add documents to this folder. You will be able to see and download them.

STEP 3



Here are the documents uploaded by you.

From here, you will upload each document to the folder with the appropriate year.



There are 3 ways to upload documents.

- A. Click the blue + sign in the top right corner. Then select the document(s).
- B. "Drag and drop" the file(s) over the purple folder icon.
- C. Click the underlined "Browse files" option and then select the document(s) you want to add.