

Desktop Vault Overview

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 navigate and utilize the Vault, including how to upload files from your computer.

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.

Navigating the Vault

1. Click the **Vault** tab from the top navigation bar. As mentioned above, the two folders you can upload files into are **My Private Documents** and **Shared Documents**. Use **My Private Documents** to store any personal files and use **Shared Documents** when uploading files that you want your Advisor to view and have access to.



PERSONAL FINANCIAL WEBSITE

Home Organizer Workshop Spending Investments **Vault** Reports

Help Settings Sign Out

Vault New Folder Upload Files

Files Search

Name	Size	Shared	Created
My Private Documents	0 Files		2/27/2017 at 1:47 pm
Shared Documents	10 Files		2/27/2017 at 1:47 pm

Usage: 400.34 KB (0 B are private)

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 click into either folder, you can now use the **New Folder** and the **Upload** button in the top right. Clicking the **New Folder** button allows you to create sub-folders for further organization of your files.



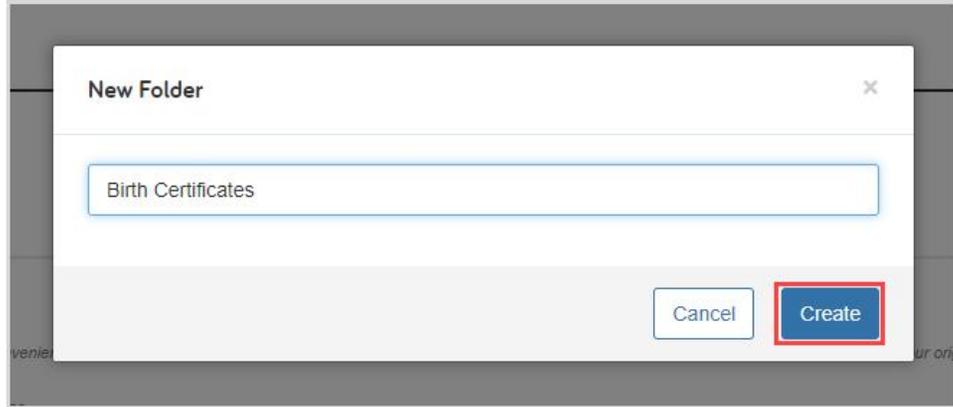
Vault New Folder Upload

Files > My Private Documents Search

Name	Size	Shared	Created	Actions
Children's Documents	0 Files		2/27/2017 at 1:47 pm	Actions
Family Information	0 Files		2/27/2017 at 1:47 pm	Actions

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3. After creating a new sub-folder, you will be prompted to enter the folder's name. Click **Create** when finished. Follow these steps to add as many sub-folders as needed.



Upload Files to the Vault

1. To upload files or an entire folder from your computer, first click either the **My Private Documents** or **Shared Documents** folder, then click **Upload** and select **Files** or **Folder**. If you want to upload to a sub-folder you have created, click the **sub-folder** first, then click the **Upload** button.

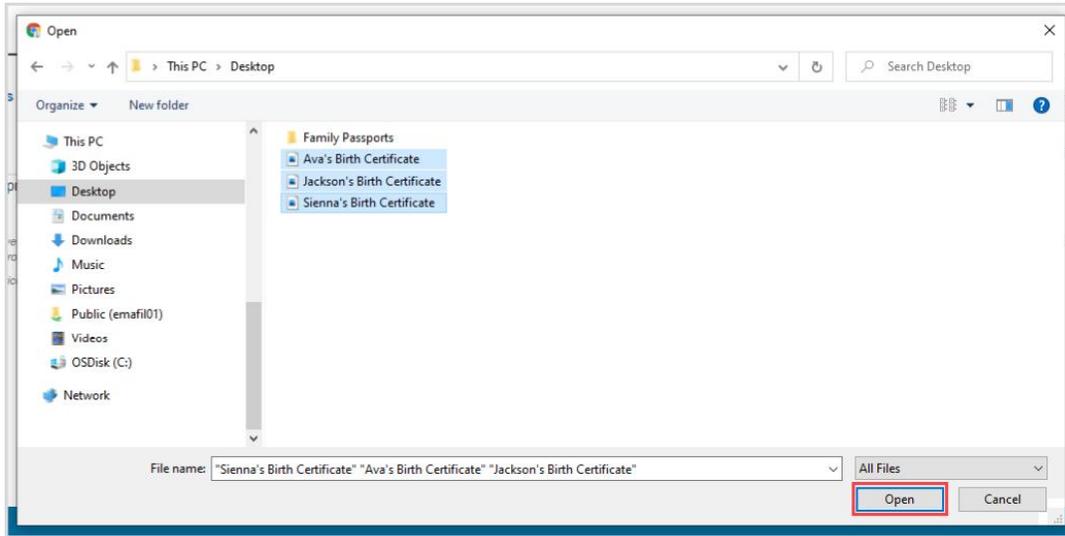


Note: Uploading a **folder** from your desktop will create a **sub-folder** in your Vault containing the files in that folder. Therefore, you may not need to manually create sub-folders in your Vault to upload to if your desktop files are organized in this way.

If you uploaded files to the wrong folder you can always use the **Move** option. This is explained on page 4.

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- 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.

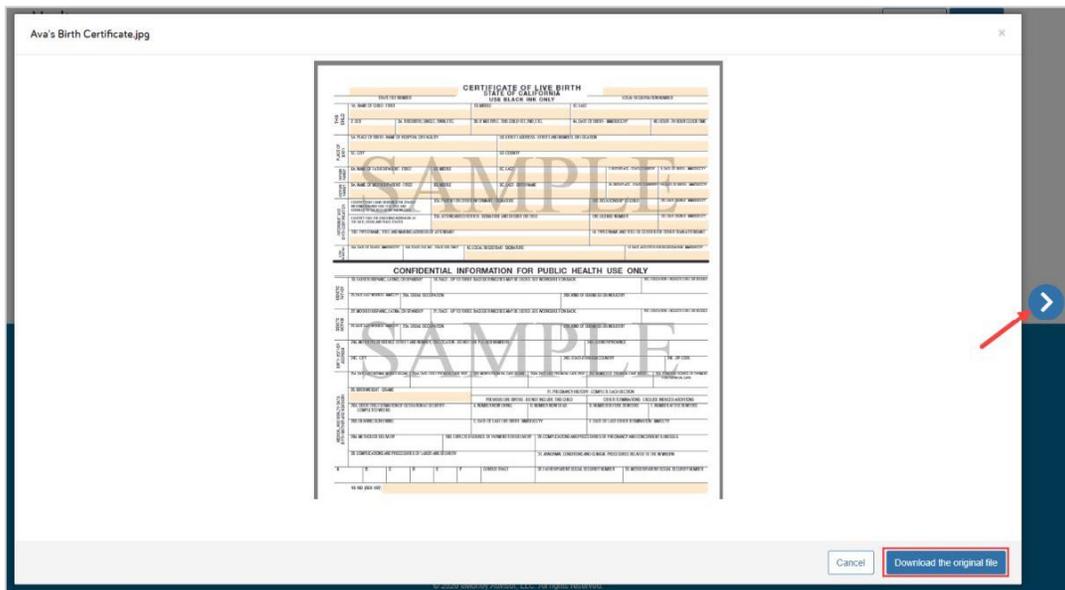


- Once the files are successfully uploaded, you will see a green banner confirming the upload at the top of your Personal Financial Website.



Vault "Actions"

- Clicking on a file in your Vault will bring you into preview mode where you have the options to **Download the original file** and easily preview other files within the folder.



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- Each file has an **Actions** drop-down menu giving you the options to **Download**, **Copy**, **Move**, **Rename**, and **Delete** files.



Please Note:

- **Download:** This option will download the file to your desktop.
- **Copy:** This option allows you to copy the file and paste it into another folder, without removing it from the original folder.
- **Move:** This option allows you to move the file from this folder to another folder.
- **Rename:** This option allows you to rename the file name in your Vault.
- **Delete:** This option allows you to delete the file. Once deleted, the file cannot be recovered.

- A final note, remember you can use the **Search** field to quickly filter through all of the files in your Vault.



Just a few eMoney success stories:

- A user added a picture of his passport, uploaded from his smartphone to his eMoney Vault prior to traveling overseas. He lost his passport, and because he had a picture he was able to access from his smartphone, he was able to get a replacement much faster.
- A user had her identity stolen. Instead of having to monitor over 10 different financial institutions on 10 different websites for fraudulent activity, she was able to log on to eMoney daily and review her transactions for all accounts in one place.
- A user slowly developed cognitive impairment. The eMoney site was a godsend to him because he did not have to remember 8 different passwords for all of his accounts. He could just log on to his personal eMoney financial website and see all of his accounts. He was also able to give his daughter access to the site, with her own restricted use, with view only, and her own user name and password, to help him monitor his assets and spending. The eMoney website gave the daughter great peace of mind, knowing she could help her dad in a way she could not have otherwise helped him. She was aware of dad's cognitive impairment, and previously she constantly worried for his financial wellbeing.
- A user lost all of their original trust documents in a fire. They were able to retrieve and print copies in their eMoney vault and provide them to an attorney to create new original documents. They were also able to obtain and print the three life insurance policies they had stored in the eMoney Vault, and the fire insurance policies which were lost in the fire. This helped greatly to speed up the claims process. They also had pictures of the inside of their home, and their valuables uploaded to the vault.

A few ideas to get you started. We have high speed scanners. You may contact us to find out how we can scan and upload some of your important documents for you.

Out of an abundance of caution, do not upload any documents that have your social security number, or credit card numbers, or account numbers. Important Note: ALWAYS retain your original documents.

Vault Storage Ideas:

The following are important files that can be stored in your eMoney Vault. Think of items that need to be located by family members in the event of an emergency such as a flood or fire, or a premature death.

Important Note: ALWAYS retain your original documents. These are back up copies for emergency access by you.

- Trust documents
- Wills
- Durable Power of Attorney documents
- Video or audio instructions to your children or beneficiaries regarding your wishes
- Video or audio words of wisdom to your children or grandchildren
- Pictures of valuable items for insurance purposes
- Titles and deeds to homes and other properties
- Titles to cars

- Home movie clips
- Back up for important pictures
- Temporarily scan a copy of identification and passport when traveling overseas
- Fire insurance policies
- Earthquake and flood insurance policies
- Car insurance policies
- Long-term care policies
- Disability insurance policies
- Health insurance policies