Client 1st ADVISORS
REGISTERED INVESTMENT ADVISOR

# "Your Virtual Safe" Start-up Cheat Sheet

**In an effort to provide our elite clientele with world class, state-of-the-art customer service, Client 1st Advisors is rolling out "Your Virtual Safe". "Your Virtual Safe" is a highly secure online portal that allows you to store sensitive documents & information virtually. Having your important documents stored electronically is extremely advantageous for many reasons. Replacing a lockbox or safety deposit box, eliminating clutter & organized structure are just a few great advantages.**

**We will initially provide you access to your most recent Quarterly Report as well as your current Investment Policy Statements in your login. Going forward you will be able to upload your own files and images.**
**Some examples:**
**Wills**
**Trusts**
**Insurance policies**
**Pictures for insurance in case of natural disaster**
**Tax Returns**

## Changing your Password:

*1.)* Log in to your account by entering your email address and password.

*2.)* Once entered, click on the **"My Profile"** link in the upper right side of the screen.

*3.)* In your Profile area, click on **CHANGE PASSWORD**.
*4.)* To change your password, enter your current password, your new password, and a confirmation of your new password, in the spaces provided.
*5.)* Click on **UPDATE**, located in the upper right corner of your screen.
*6.)* Your new password is now set. *NOTE: your password must be at least 4 characters long.*

## Edit your Contact Information / Personal Information:

*1.)* Log in to your account.

*2.)* Once entered, click on the **"My Profile"** link at the upper right side of the screen.

*3.)* In your **Profile** area, click on **EDIT**.
*4.)* Update your Contact Information / Personal Information by typing your new and/or revised data in the appropriate field(s).

When you are done entering information, click **SAVE**, located in the upper right corner of your screen. *Note: your advisor will receive automatic email notification whenever information in your account has been modified or changed.*

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*Securities offered through Cascade Financial Management, Inc. Member MSRB, NASD, SIPC*

# MANAGING YOUR FILES

## Uploading Files to your Advisor(s):

1.) Log in to your account.
2.) Click on the **"Files"** tab – the first tab on the left side of your screen, under your "Welcome".
3.) Click **UPLOAD FILE** above the **"Folder List"** on the left.
4.) At the **"Upload File"** page, click **"Browse"** to be taken to your hard drive / local machine.
5.) Locate the file you want to upload and double click on the file. The selected file's location on your computer will appear in the box to the left of the **"Browse"** button.
6.) Input information on the **"File Version"** and **"Description"** in the spaces provided [Optional].
7.) Select an advisor to assign the file by clicking the button to the left of the advisor's name.
8.) If you would like to leave an Optional Message for the advisor recipient, fill in the **Subject** and **Message** sections in the lower portion of the screen.
9.) Click **UPLOAD** and the file will appear in the **"File List for Client Uploads Folder"**. *Note: the advisor to whom you assign the file will receive email notification that you uploaded a file for review in your* ***"Client Uploads"*** *folder.*

## Reviewing Files:

1.) Log in to your account.
2.) Click on the **"Files"** tab – the first tab on the left side of your screen, under your "Welcome".
3.) In your **Files** area, you will find a list of folders on the left side of the screen. The number of files within each folder is indicated by a number after the folder name.

**Example: Client - Documents** (2)

4.) Click on the folder that has the file you want to open.
5.) Click on the file you want to review.
6.) Based on your internet browser settings, you will be able to download, open or save that file to your computer.

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**U:**

**P:**

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