Account View
My Documents

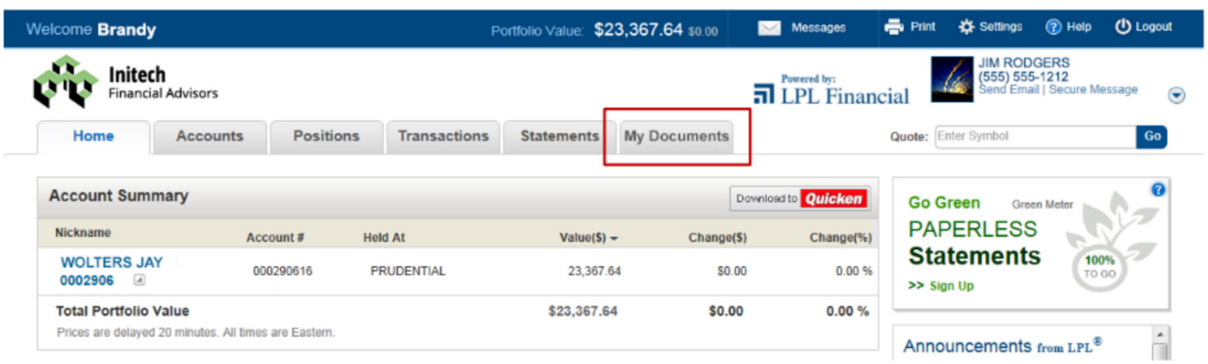
User Guide Supplement

My Documents, within Account View, is your online vault for documents you would like to share with your financial advisor who assists you with your investment decisions. You can use **My Documents** for documents like a 401k statement from your company, a summary document for bank statements, real estate planning documents or even a copy of your driver's license or passport.

With **My Documents**, you can trust that these documents are kept private and confidential, and are held securely in Account View. The following pages are instructions for how to use **My Documents** to upload and access documents.

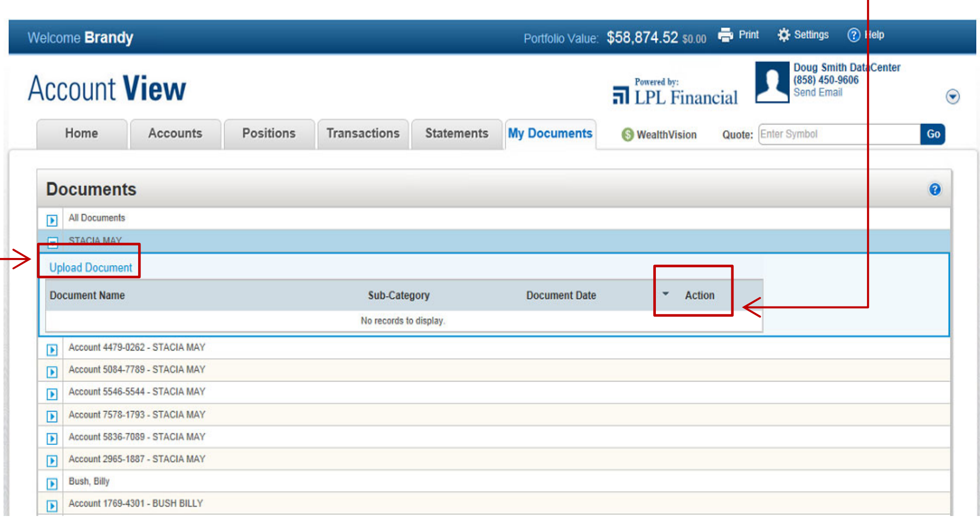
1

On the home page of Account View, select the **My Documents** tab



In **My Documents**, you can upload documents via the **Upload Document** link

You can view the uploaded documents by selecting **View**, found under the **Action** column

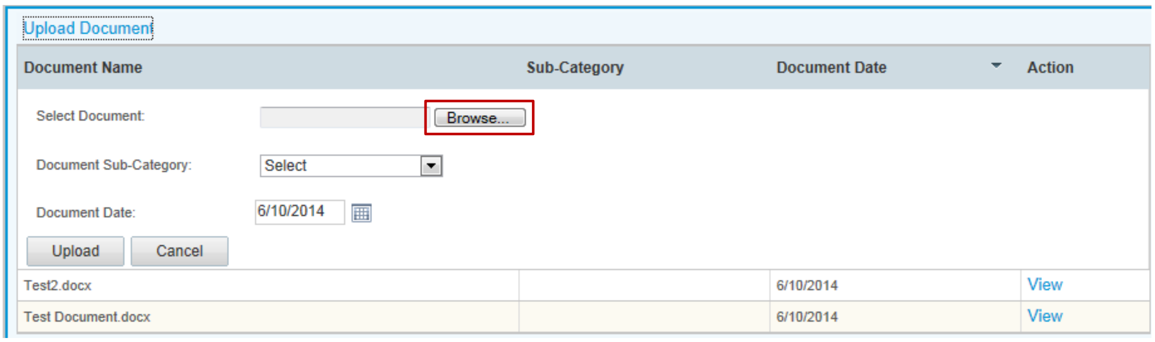


2

To upload a document, select **Upload Document**

The area expands and you can now **Select the Document** you wish to upload

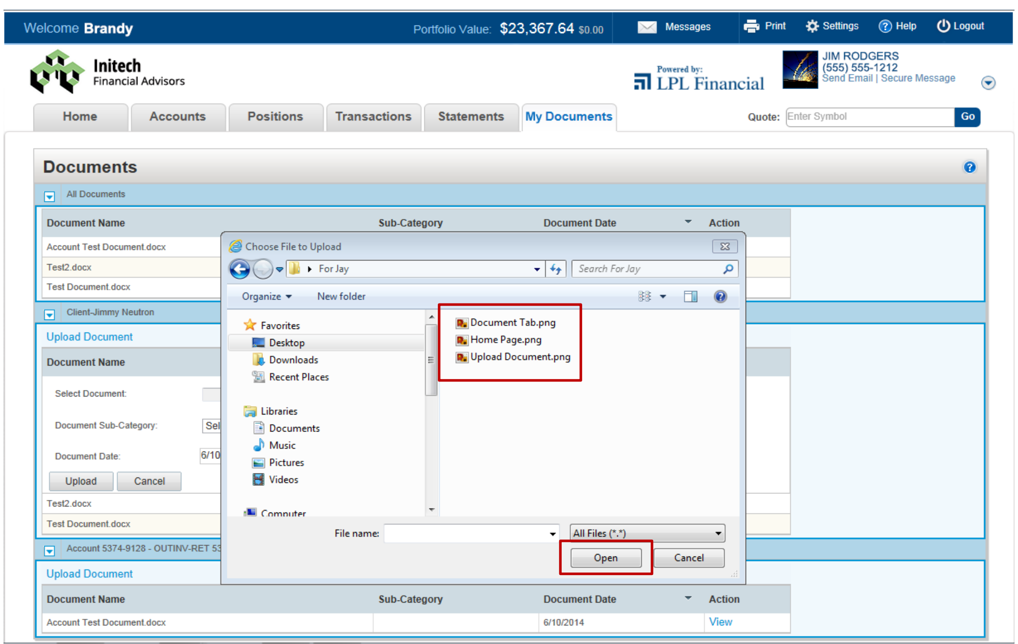
Select the Browse button



3

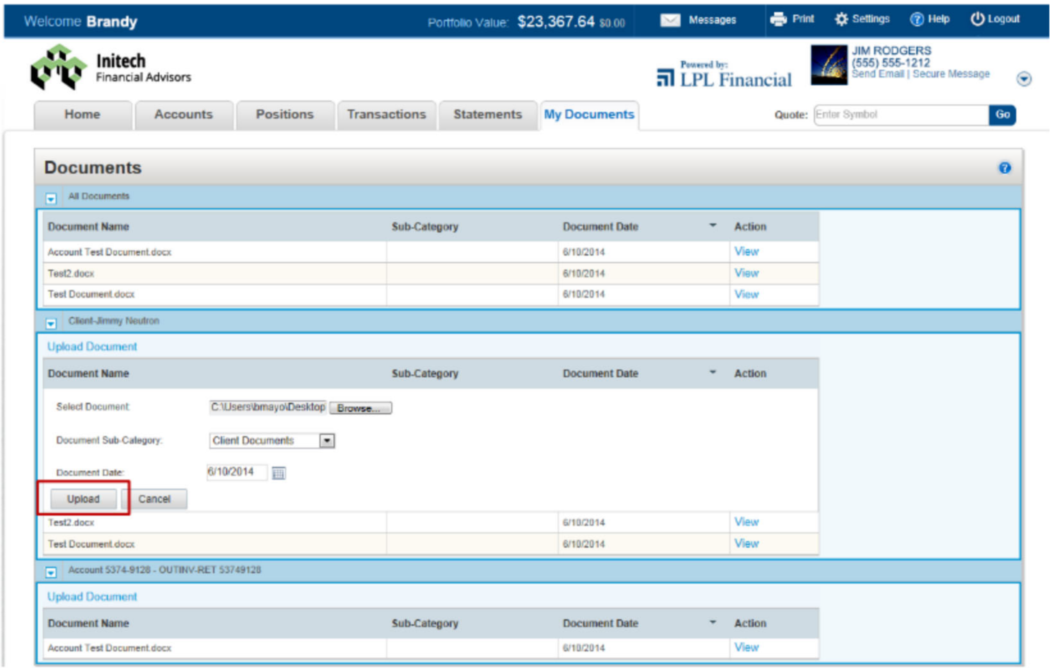
Navigate to the file folders on your computer to find the file you wish to upload

Highlight the file and select **Open** to upload to **My Documents**



4

Select **Upload** to store the document in **My Documents**



5

Once the file upload has completed, the **Upload Successful** prompt will appear

To view the document, select **View**

If you wish to delete the document from **My Documents**, please contact your Financial Advisor