

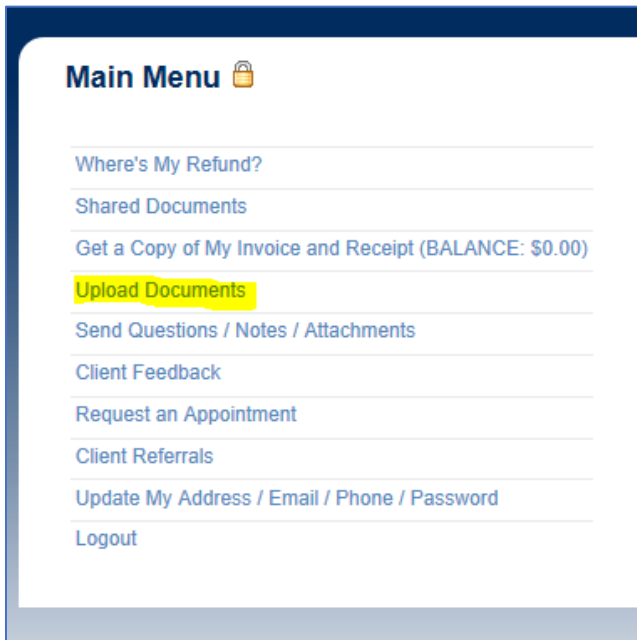
How to Upload Documents to the Averett Financial Secure Client Portal

Step 1: Access the portal. Follow link provided in email or type:

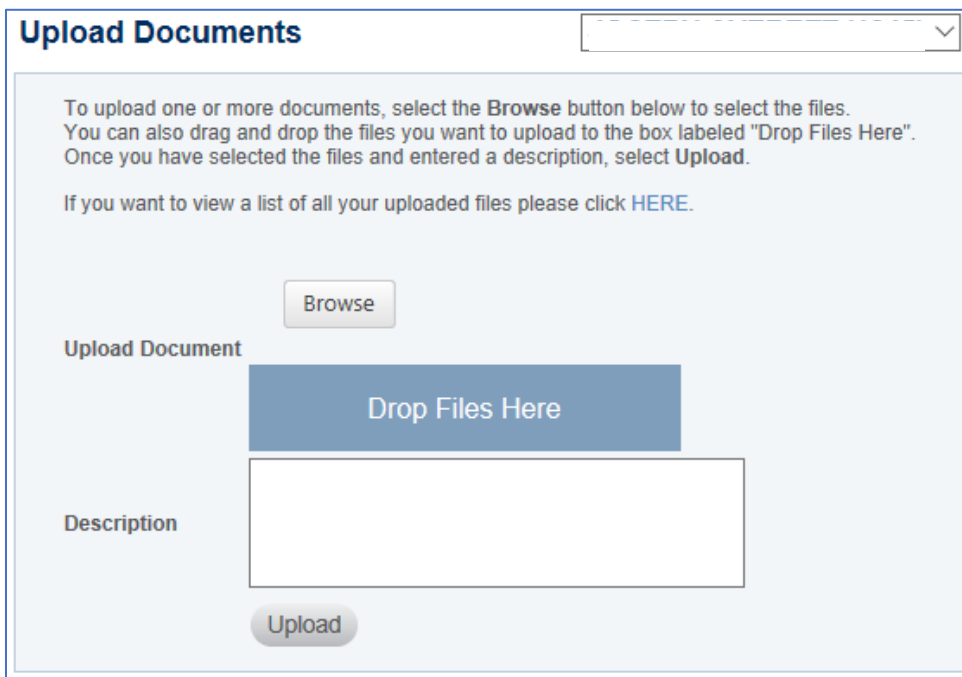
<http://www.averettfinancial.com/secure-portal>

Step 2: Log in. Use your SSN, no dashes.

Step 3: Click on “Upload Documents” (shown below)



Step 4: Browse or drag files as described on the screen.



Upload Documents

To upload one or more documents, select the **Browse** button below to select the files. You can also drag and drop the files you want to upload to the box labeled "Drop Files Here". Once you have selected the files and entered a description, select **Upload**.

If you want to view a list of all your uploaded files please click [HERE](#).

Upload Document

Description

Step 5: Press the “Upload” button.