How to Upload Files to Your Together Planning Client Portal

Use the “Client Portal” link on the Clients page of our web page, www.togetherplanning.com to login to your portal. Your username is the email address that we have on file for you. You can reset your password if you don’t know it or ask us to reset it for you.

← Click the file folder icon on the left side of the screen

Document Vault

Home

NAME		LAST MODIFIED	FILE SIZE
1099 Tax Reports	← Year end tax reports for your accounts.		
Advisor Shared	← Access and upload shared files here.		
Custodial Statements	← Monthly statements from TD Ameritrade / Schwab.		
Portfolio Statements	← Quarterly reports from Together Planning.		

Once you open the Advisor Shared folder, you can click the upload button in the upper right corner to securely share files with us.

Document Vault

Home > Advisor Shared   ⊕ New Folder   ⊕ Upload