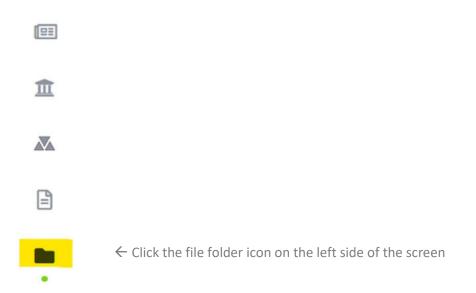
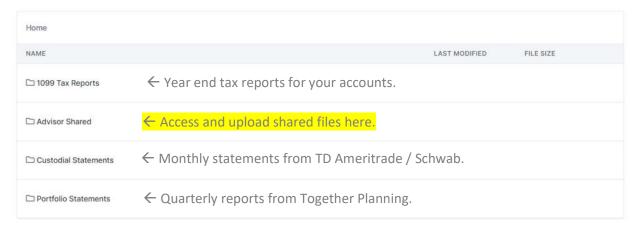


How to Upload Files to Your Together Planning Client Portal

Use the "CLIENTS" 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.



Document Vault



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

