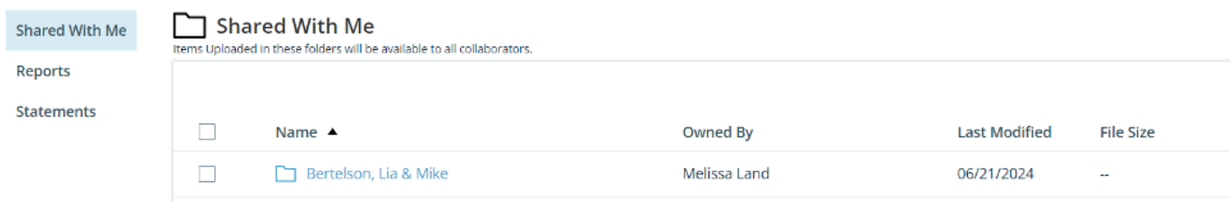
together planning
FINANCIAL PLANNING INVESTMENT MANAGEMENT

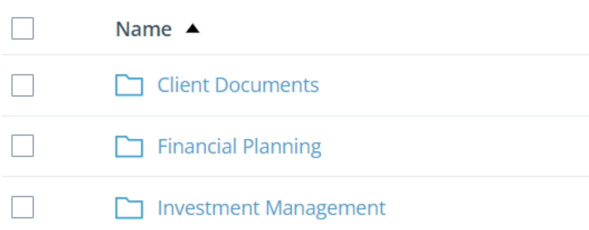
How to Upload Files to Your Together Planning Client Portal

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.

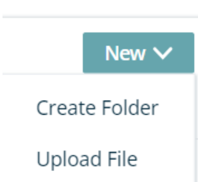
Click on the **Vault** tab at the top of the screen:



The **Shared With Me** tab on the left will open a folder with your name. Within that folder, there will be a few folders. The **Client Documents** folder is where we will store any documents that you provide to us. This is where you can also upload additional documents.



Open the **Client Documents** folder



Then click **New** and **Upload File**.

This will allow you to choose files saved on your computer to share with us. We will get a notification when you upload something.

The other two tabs on the left side of the vault are **Reports** and **Statements**. **Reports** will house your quarterly performance reports from us. **Statements** will house your monthly statements and annual tax forms from Schwab.