How to upload/download files to and from your eMoney Vault

Step 1: Go to www.WealthGuards.com and click on "Client Center":



Step 2: Click on eMoney logo:



<u>Step 3</u>: Log into eMoney using your credentials we set up during your meeting:

WEALTH STRATEGIES										
4	Username									
	Password									
	Remember Me									
Sign In										
Forgot your password?										

<u>Step 4</u>: Your eMoney portal will have a menu of pages, click on the "Vault" page:

IIIII PAR AGON	Home	Organizer	Workshop	Spending	Investments	Vault	Reports		Help	Settings	Sign Out
Welcome,											

<u>Step 5</u>: Click on the "Shared Folder" – this folder allows us to see what you share with us:

Vault	t
Files	
Name	
	Whealthcare Aging Plan & Documents
	Taxes
	Shared Documents

<u>Step 6</u>: On the top right corner, click on "Upload" button, select "Files" – this will allow you to select a file/document you would like to upload from your computer.

PARAGON	Home	Organizer	Workshop	Spending	Investments	Vault	Reports			Help	Settings	Sign Out
Vault										Nev	w Folder	Upload -
Files > Shared Documents								search b	oy name		Search	
									L	-		
Name								Size	Shared	Cr	eated -	

<u>Step 7</u>: Select the file and click "Open" on the bottom right of the dialog box.