eMoney – How to Upload to the Vault

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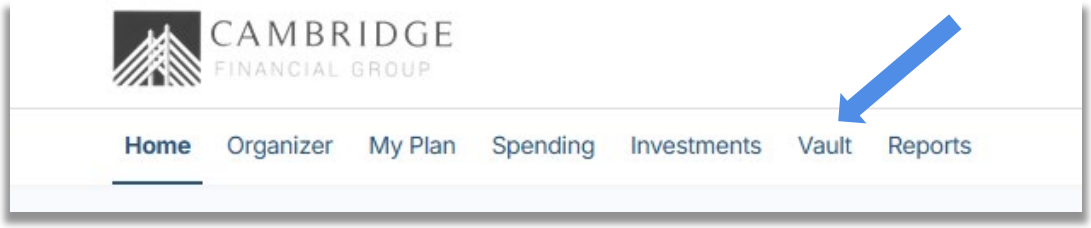
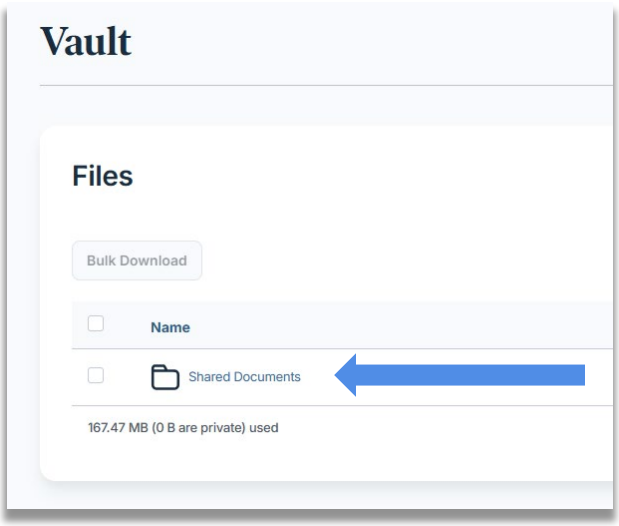
1. Click here to log into your account.

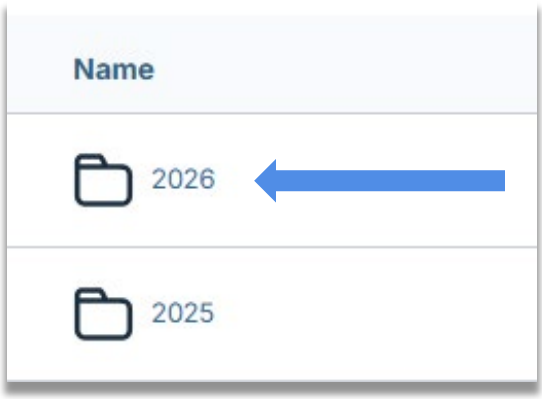
2. From the Home Page, click “Vault”



3. Click the “Shared Documents” folder



4. Enter into the folder for this year
   ***If you’re uploading tax documents**, click the year you’re preparing taxes for. Ex: in 2027 you would upload your tax documents under the year 2026.



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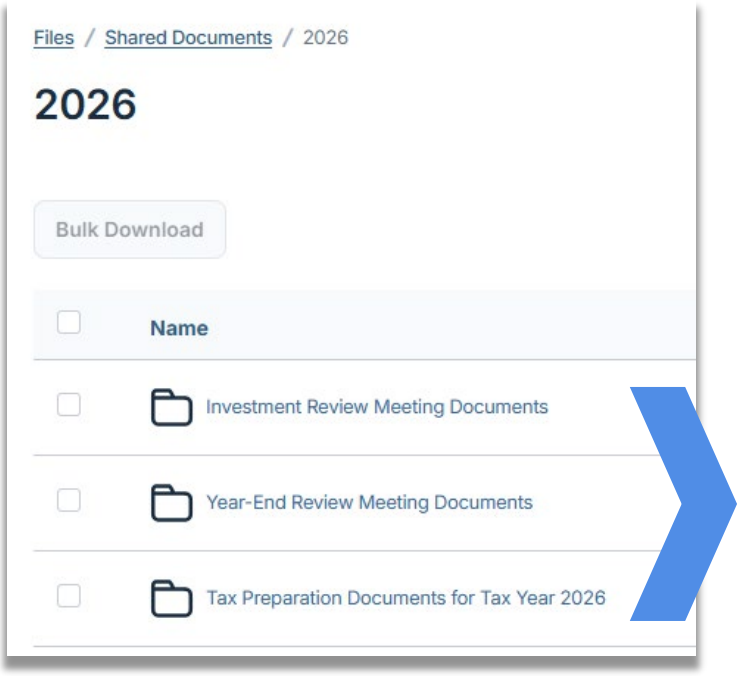
5. Click on the folder for your meeting type

   Generally, if your upcoming meeting is between:

   - Jan-Apr: Tax Preparation Documents (for the prior year)
   - May-Aug: Investment Review Documents
   - Sept-Dec: Year-End Review Documents



6. Click “Upload Files” and choose either “Files” for individual files or “Folder” to upload an entire folder with all its contents.

