

**Welcome to our secure online portal SmartVault!**  
**UPLOAD AND VIEW YOUR TAX DOCUMENTS IN JUST A FEW SIMPLE STEPS**

SmartVault is a fast, easy and secure way for you to send your tax documents.

As a client you already have a SmartVault account.

Please follow these steps to activate your log-in:

- Call or e-mail Noelle at 303-858-0045 or [noelle.kurtz@pallerfinancial.com](mailto:noelle.kurtz@pallerfinancial.com)
- You will receive the invitation link.
- Then, you will be asked to create a password and log in.

\*If you already activated your account, please visit [my.smartvault.com](http://my.smartvault.com) to log in. Should you not remember your password follow the instructions for “Can’t Sign in?”.

To Upload/View your tax documents:

- Sign in at [my.smartvault.com](http://my.smartvault.com)
- Go to “View Files and Folders” on the left hand side
- Select your name
- Select “TY23”
  - Select “Client Tax Upload Folder”
  - Click the blue “Upload File” button in top right hand corner
  - Drag and Drop your files for upload
- Always let us know you uploaded your documents, and you are all done!

(File naming conventions - Client Name.Description.Related Year)

If you have any questions, please contact Noelle or Kim at  
303-858-0045 or via e-mail  
[noelle.kurtz@pallerfinancial.com](mailto:noelle.kurtz@pallerfinancial.com) or [kim.klein@pallerfinancial.com](mailto:kim.klein@pallerfinancial.com)

Thank you!