

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
- 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 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
- Go to “View Files and Folders” on the left-hand side
- Select your name
- Select “TY24”
 - 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 when you have completed uploading your documents

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

Thank you!