



Strategic Wealth Partners cares about protecting your personal information. With privacy in mind, we offer you a safe way to send us documents electronically. Follow the instructions below and send your documents to us in a secure manner.

- 1- Go to www.stratwealth.com and log in to your account.
- 2- Go to Virtual Safe located on the top navigation bar.
- 3- Click "Upload Files" link on the bottom right.

Upload Files

Select an account for this upload:

Click arrow and select account with "Upload" next to it.

Select a category for this upload:

Click arrow and select "Uploads".

This upload is as of:



You can leave current date or add a future date by clicking on the calendar.

The last date this upload will be available:



Click on the calendar and select a date for the file to expire.

The Upload Name (this is what appears in the list):

Create a file name. For example "Tax Return".

File: Click "Browse" and locate the file that you would like to upload from your computer.

Click the Upload button.

Please call or email Strategic Wealth Partners to notify us to retrieve your file.

Upload

Cancel