

# DASHBOARD WEALTH ADVISORS SETTING UP & POPULATING YOUR VAULT

VAULT is a secure online document storage tool you have access to via your Raymond James Client Access account. The goal of our Vault Initiative is to inventory ALL of the documentation that feeds into your Dashboard and store it electronically in one spot so it's easier for you (or your loved ones) to track down when needed. Let's get started!

## ❑ STEP 1: Establish your Client Access account

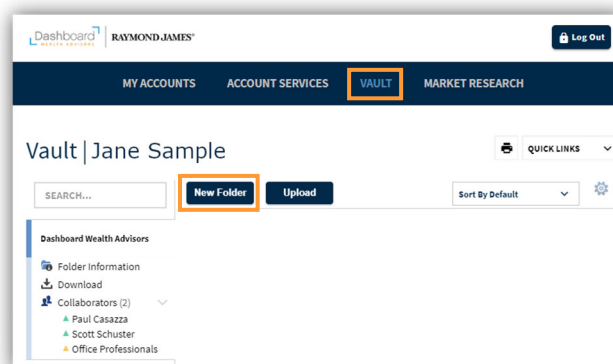
If you have not already done so, you will need to establish your Raymond James Client Access account. In any web browser, visit <https://clientaccess.rjf.com> to log in or enroll. Note that during the enrollment process, you will be asked to enter your account number – so have that information available.

## ❑ STEP 2: Create folders

To provide consistent structure and organization, we need your help in creating folders. Log into your account, and click on VAULT in the main menu.

Select NEW FOLDER and enter the name. Repeat this process until you have created 7 folders with the following names that correspond to the areas of your Dashboard:

- |                            |                             |
|----------------------------|-----------------------------|
| 1 – Investments            | 5 – Tax & Business Planning |
| 2 – Financial Independence | 6 – General                 |
| 3 – Risk & Insurance       | 7 – Personal Items          |
| 4 – Estate Planning        |                             |



## ❑ STEP 3: Review your personalized Vault Inventory

Andrea prepares a personalized spreadsheet for each family to function as a checklist for the various documents that we think should be in your Vault based on our understanding of your Dashboard. This spreadsheet has been uploaded to your Vault for easy access. Your Vault Inventory is organized and color coded similar to your Dashboard.

**RED** means you should track these documents down sooner rather than later and get these uploaded.

**YELLOW** means these are important to have in your Vault, but we don't think are necessarily the highest priority.

**GREEN** means either we have a copy we can upload once your folders are created, or we don't think it applies to you.

## ❑ STEP 4: Upload your documents!

Track down the various documents listed in your Vault Inventory and any others you would like to include. Then scan and upload these documents into the proper folders in your Vault! If you're not too far from our office, you can always drop off a stack of documents for us to scan and upload for you – we're more than happy to help!

**While we acknowledge this Initiative can involve a good amount of time and effort, we wholeheartedly believe this is an absolutely worthwhile endeavor!**



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