Sterling Client Vault Quick Start

**1** Activate your client vault account through the welcome email. ☐

1. You will receive an email from Sharefile notifying you that we have created your folder in our client vault. NOTE: If you do not see this email in your regular inbox, please check your spam/junk folder.
2. Click the "Activate Account" button/link within the email.
3. You will be prompted to set a password. Your email and the password you create will be the login information you use to access your client vault.
4. Once you log in, you will see your folder, labeled by your last name, in our vault.
5. Once you are ready to log out, click "Log Out" in the upper right hand corner, instead of just closing the browser.

2 Visit SterlingWealthAdvisors.com to log into your vault account. ☐

1. Go to SterlingWealthAdvisors.com and, on the home page, click "Current Clients."

2. After clicking Current Clients, select "Client Vault."
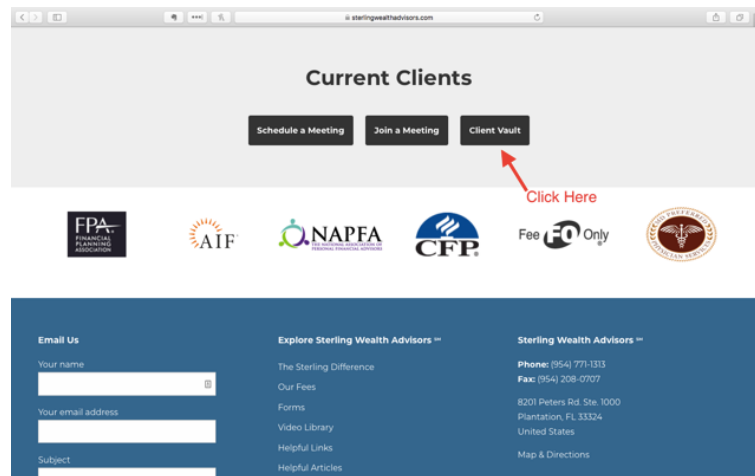
3 Enter your credentials on our "Client Vault" page, and click "Log In." ☐

    1. Scroll down the page and, under "Access Your Client Vault Folder", enter your email. (You will use the email address you activated your account with.)
    2. Enter your password.
    3. Click "Log In."

    • This will give you access to your personal folder in the vault. Here you can download files we have placed in your folder, or you can upload files to us. (For instructions on downloading and uploading, please see the "Basic Client Guide" document on our "Client Vault" page.)

4 Or you may quickly and securely send us a file without logging in. ☐

    1. Scroll down to the bottom of our "Client Vault" page on our web site to access our "Securely Send Us a File" form.
    2. Enter the required information (your email address and name).
    3. Choose the file/document you'd like to send. You can drag and drop it into the field that says "Drag files here," or you can click "Browse files" to find the file you want to upload.
    4. Then click "Upload."

Securely Send Us a File

Email*

First Name*

Last Name*