Sterling Client Vault Quick Start

1 Activate your client vault account through the welcome email.

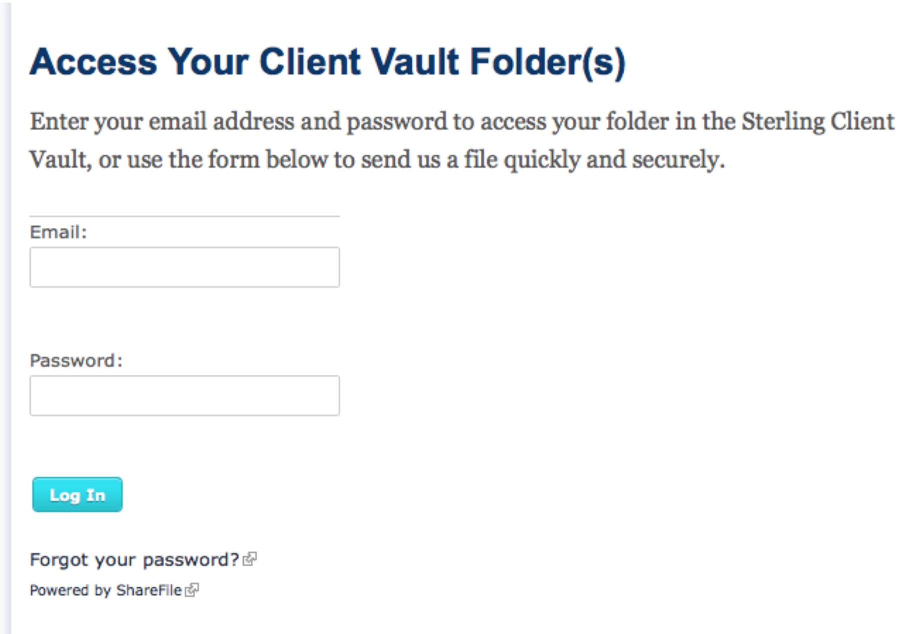
- You will receive an email notifying you that we have created your folder in our client vault.
- This email will contain a link. Please click the link.
- You will then be prompted to change your password.
- Once your password is changed, your account activation is complete.
- You will see your folder in our vault.
- You may log out of your account or take a minute to look around.

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

Under "Clients" in the main menu, click on "Client Vault."

3 Enter your credentials on our "Client Vault" page, and 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.

- Scroll down to the bottom of our "Client Vault" page on our web site to access our "Securely Send Us a File" form.
- Enter the required information.
- Choose the file/document you'd like to send.

- Click "Upload Files."