

HOW DO I UPLOAD MY ITEMIZED STATEMENTS?

If you have access to your statements online, here is what you'll do:

- 1. Log in to your investment accounts.
- 2. Click download PDF version and choose a file folder you would like to download it to. We

recommend the Downloads folder.

3. Next, click here to visit our Statement Upload portal as shown below.

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Why we need statements: In order to build your Roadmap, we need to know what individual investments you have. This allows us to run our Fee Filter to identify the fees you are paying on investments and our Market Flashlight to show what level of risk is currently in your portfolio.	Upload Statements
Please upload itemized statements. We need statements that list your individual investments instead of just an account balance summary. Not required, but if available, please include 2 years of tax returns. This allows us to	Enter your email Upload files *
build your Tax Map which is a plan for minimizing the amount of taxes you may pay on your 401k and IRA accounts in retirement. Is this site secure? File uploads are supported by Box.com. Read more about their security protocols	
GoldenReserve	Drag and drop files Select Files
ROADMAP FOR RETIRE WAY Why we require itemiz statements.	Submit

- 4. Enter your email address.
- Next, click "Select Files" and select the file(s) you downloaded (Downloads folder is recommended).
- 6. Repeat this process for multiple files.
- 7. Once you have added all your itemized statements, click Submit.