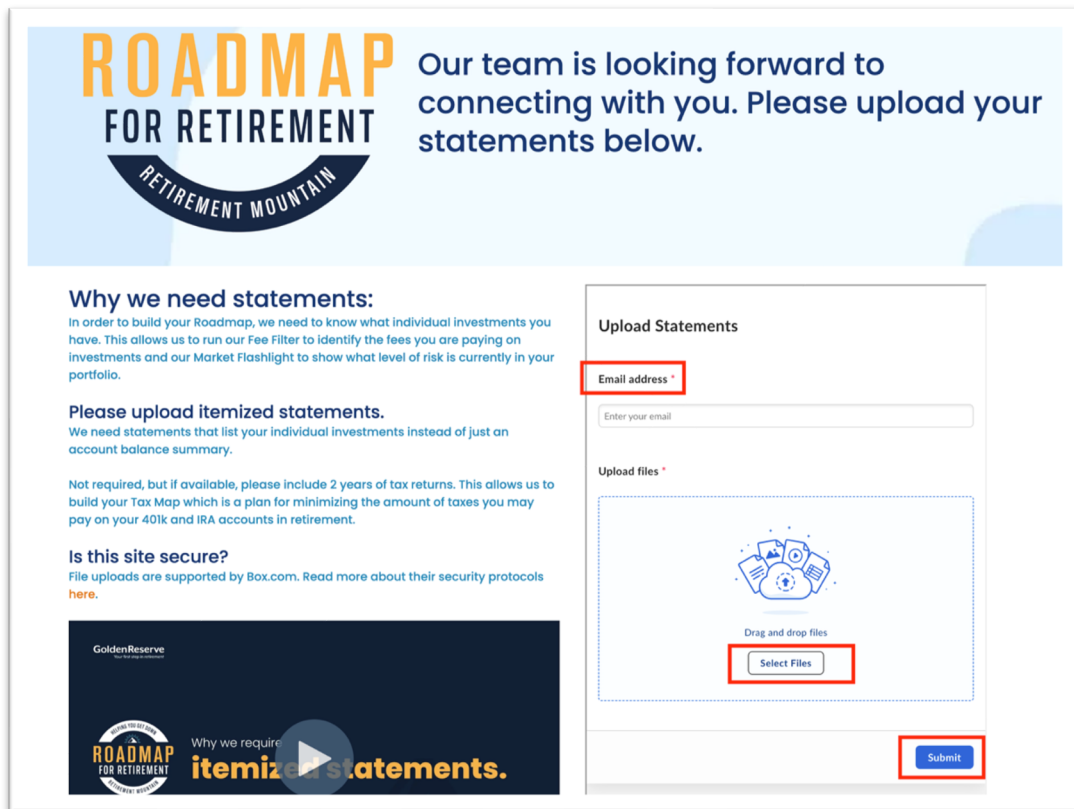


## HOW DO I UPLOAD MY ITEMIZED STATEMENTS?

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.



4. Enter your email address.
5. 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.