



Sending Documents Securely

We always have security in mind. To that end we prefer existing clients to use one of the following methods:

- a. The preferred choice is to upload documents directly to us via our secure document vault on your personal SOA Portal. Just click here and enter your user name and password. You can easily upload your documents by selecting the **Uploads** folder under the **Vault** tab. Then just drag and drop your file or select New...Upload File.If you need assistance our client technology concierge, Kathy LaQuadra can help you.
- b. You can respond directly to this email with an encrypted, password protected document. Please send your password in a separate email.
- c. You can just use regular US postal mail for your document.
- d. You can fax us your documents at 212-977-4888
- e. In person

Prospective clients should contact your advisor prior to sending any documents.