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. Once logged in, you can easily upload your documents by selecting **Vault**… **Documents**, and then clicking on **Uploads (Your Name)**. You can now drag and drop your file, or select **Upload File**. If you need assistance our client technology concierge, Kathy LaQuadra can help you and can be reached at 212-977-3111 or at kathy.laquadra@soawealth.com.

b) You can respond directly to your advisor 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

❖ Please note that once your files are uploaded, our team organizes them into their respective folders in Storage.

❖ Prospective clients should contact their advisor prior to sending any documents.

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