



9000 E. Nichols Ave., Ste 120
Centennial, CO 80112
303-858-0045

Secure Document Exchange

- Log in and upload documents to your account on our secure online portal, SmartVault
*For assistance call or email Noelle at:
303-858-0045 / noelle.hanneman@pallerfinancial.com
- Mail or Drop Off to the office at:
Paller Financial Services
9000 E. Nichols Ave., Suite 120
Centennial, CO 80112
- Please **do not** e-mail your data.

SmartVault

SmartVault is a *fast, easy, and secure* way for you to send your tax documents.

UPLOAD AND VIEW YOUR TAX DOCUMENTS IN JUST A FEW SIMPLE STEPS

As a client you already have a SmartVault account.

Please follow these steps to activate your log-in:

- Call or e-mail Noelle at 303-858-0045 / noelle.hanneman@pallerfinancial.com
- You will receive the invitation link via e-mail.
- Then, you will be asked to create a password and log in.

If you already activated your account, please visit my.smartvault.com to log in. Should you not remember your password follow the link for "Forgot password?".

To Upload/View your tax documents:

- Sign in at my.smartvault.com
- Go to "View Files and Folders" on the left-hand side.
- Select your name.
- Select "TY25"
 - Select "Client Tax Upload Folder"
 - Click the blue "Upload File" button in top right-hand corner.
 - Drag and drop your files for upload.

Always let us know when you have completed uploading your documents

Thank you!