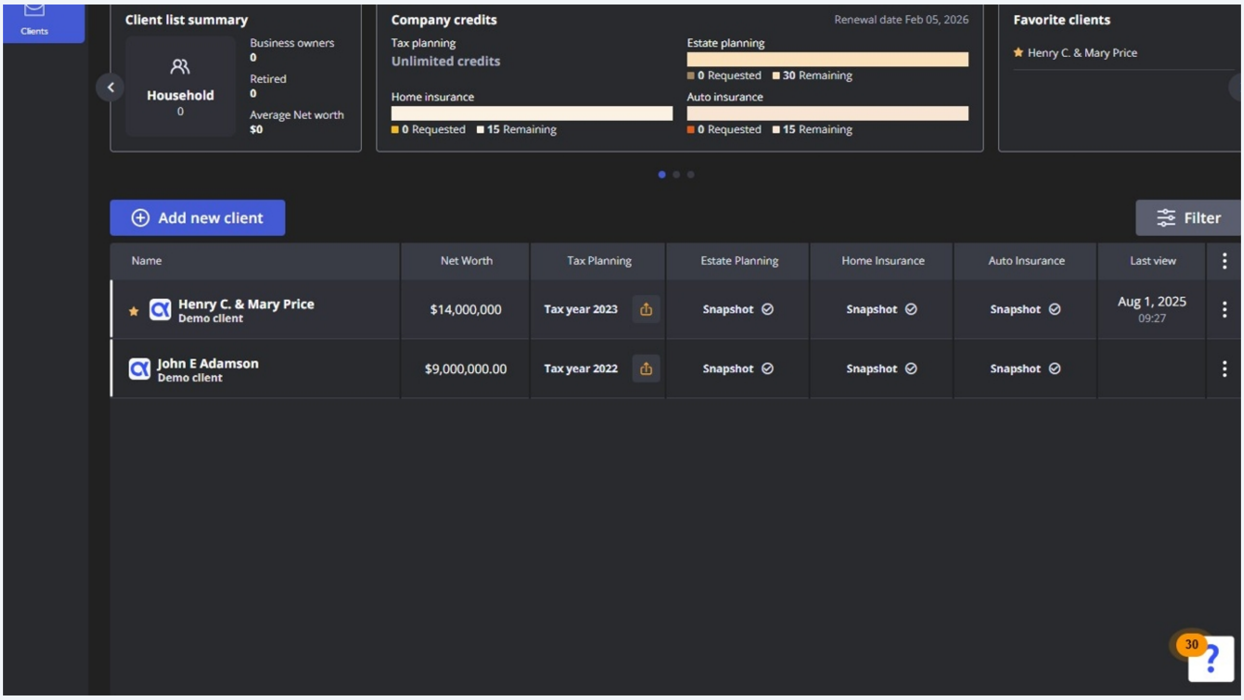
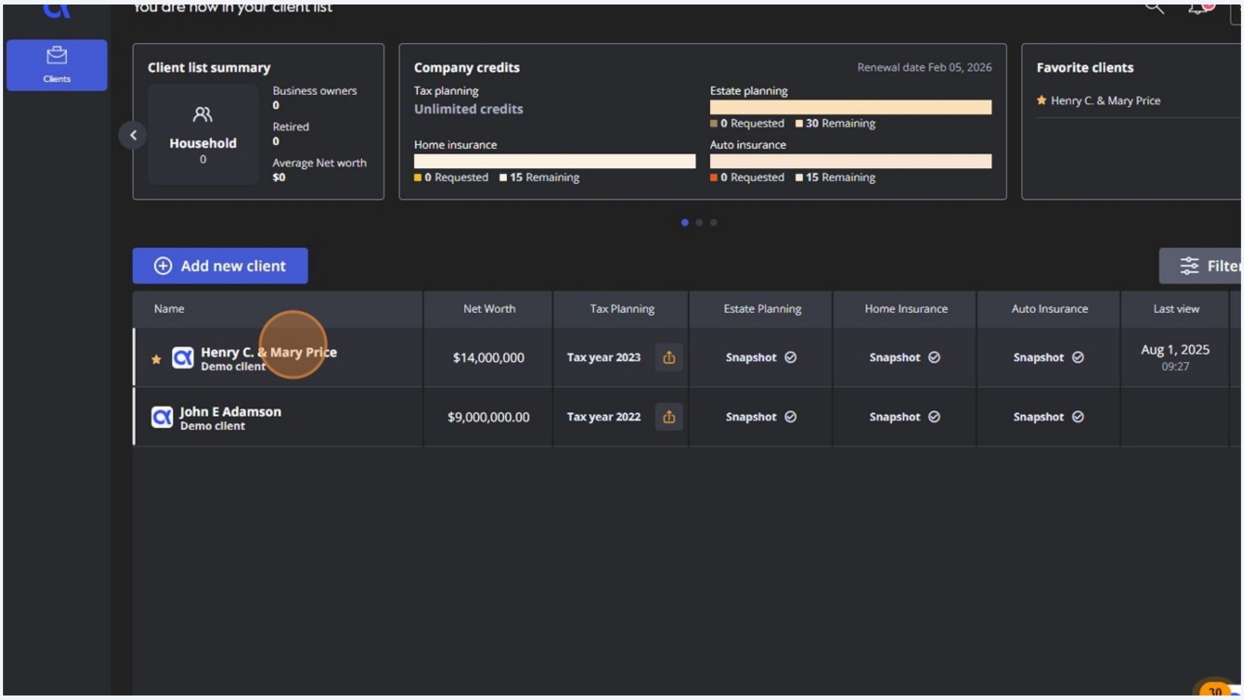
Upload Estate Hub Documents for Clients

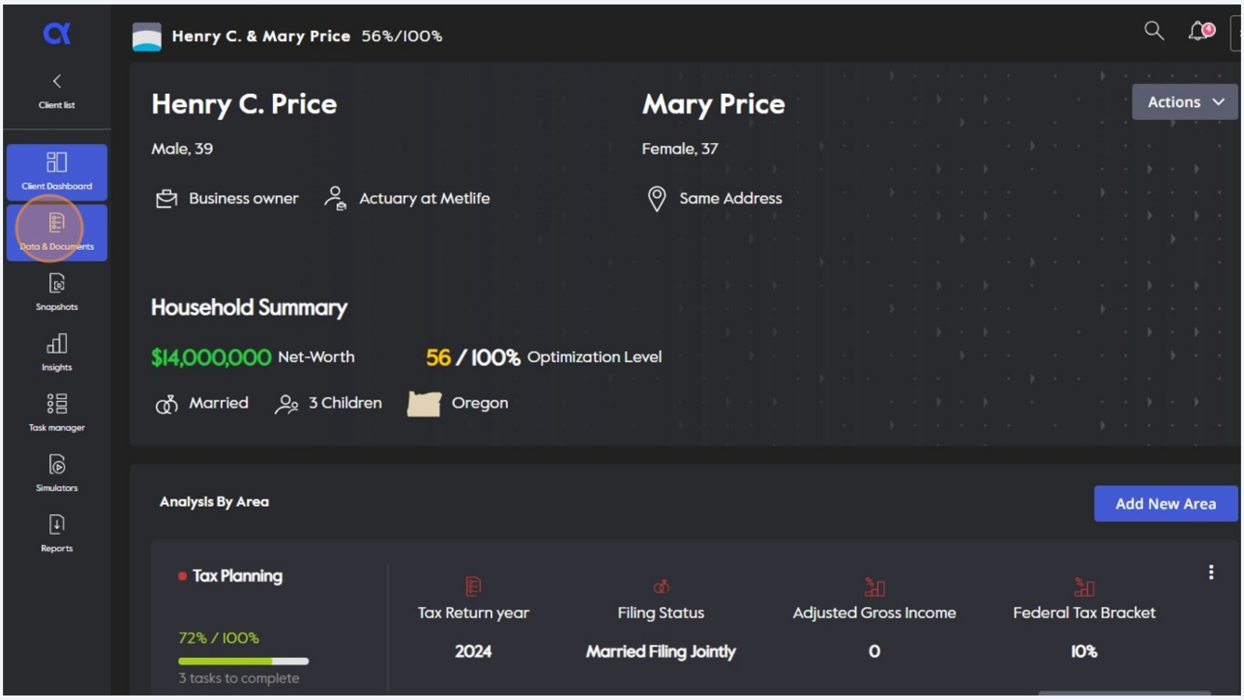
1 Navigate to https://app.fpalpha.com/advisor/clients



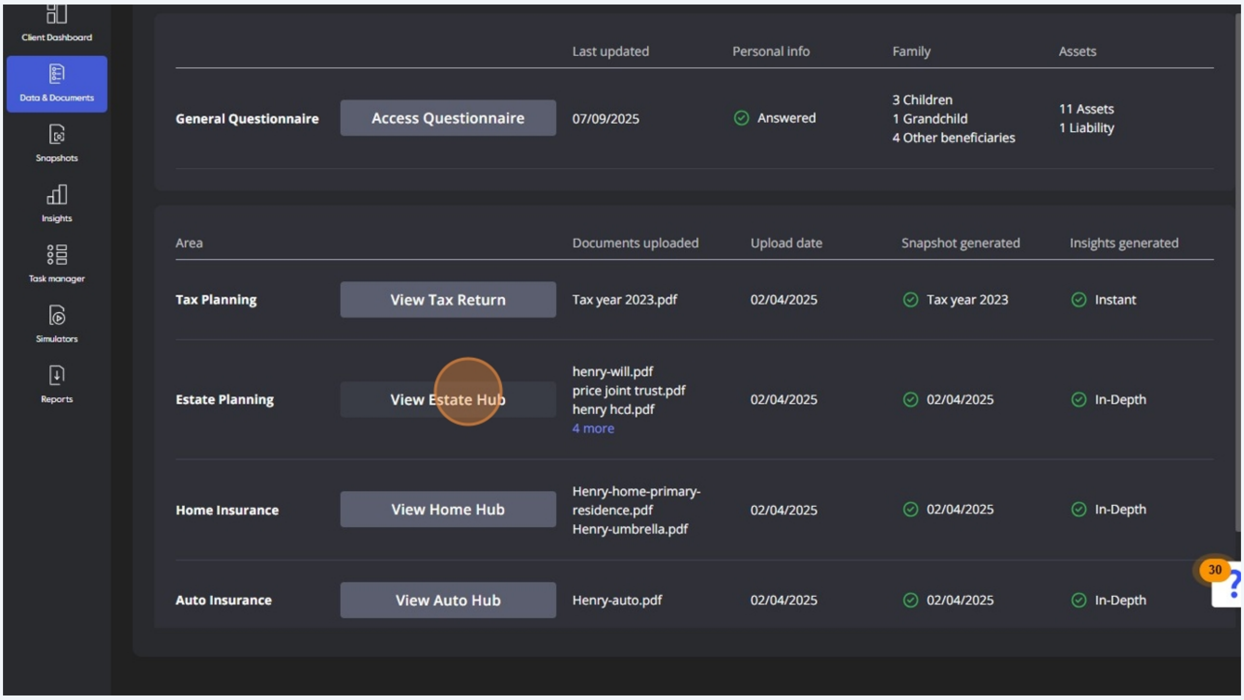
2 Click on your client file



3 Click "Data & Documents"

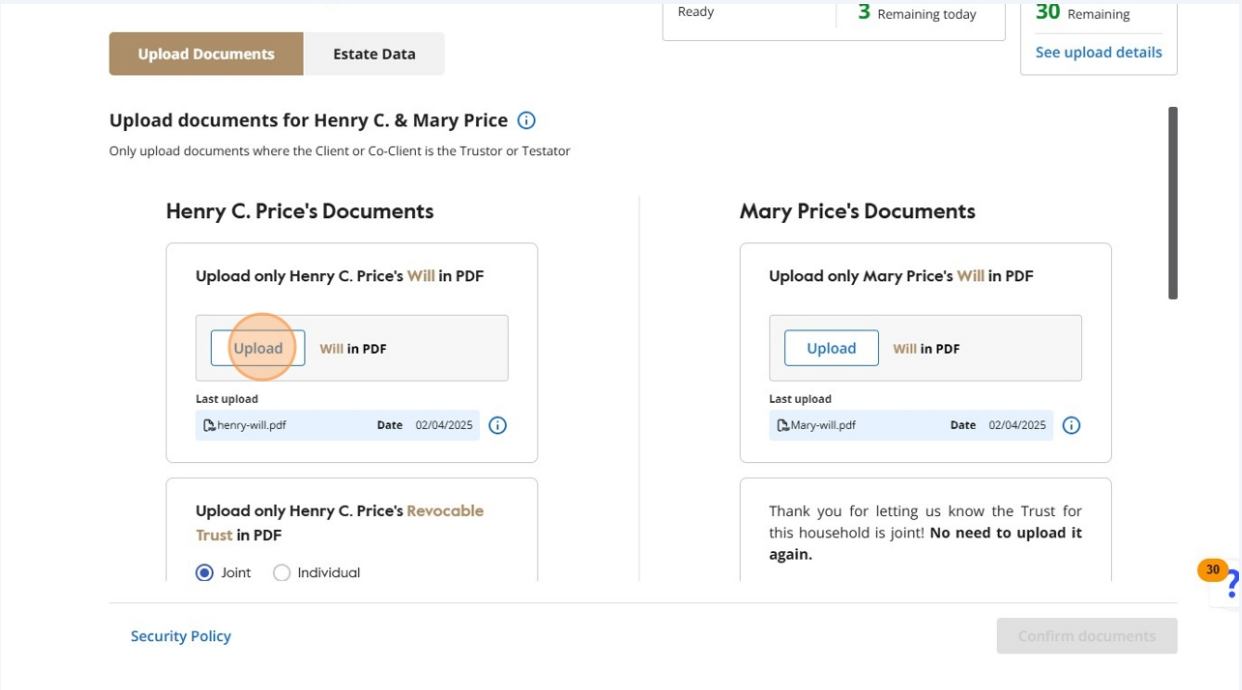


4 Click "Upload Estate Documents" / "View Estate Hub"



5 Click "Upload" and select the client's Will

Repeat this step on the right side of the screen (if applicable) for the co-client

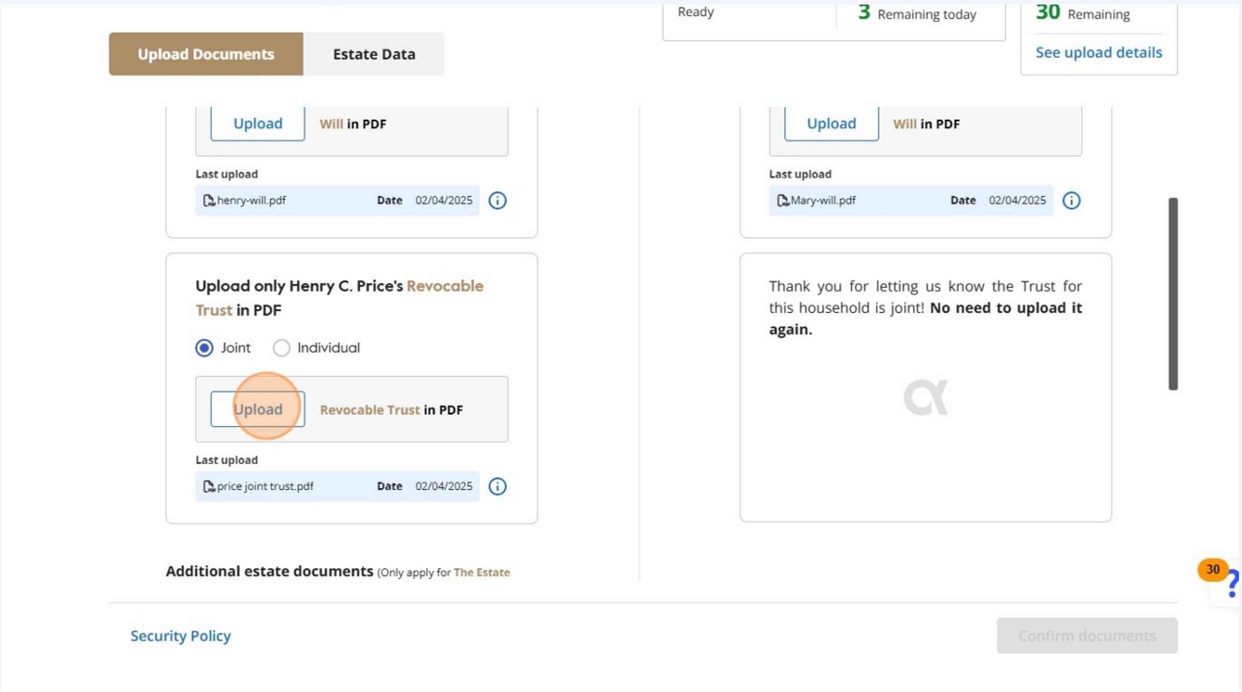


6

Click "Upload" and select the Joint Revocable Trust

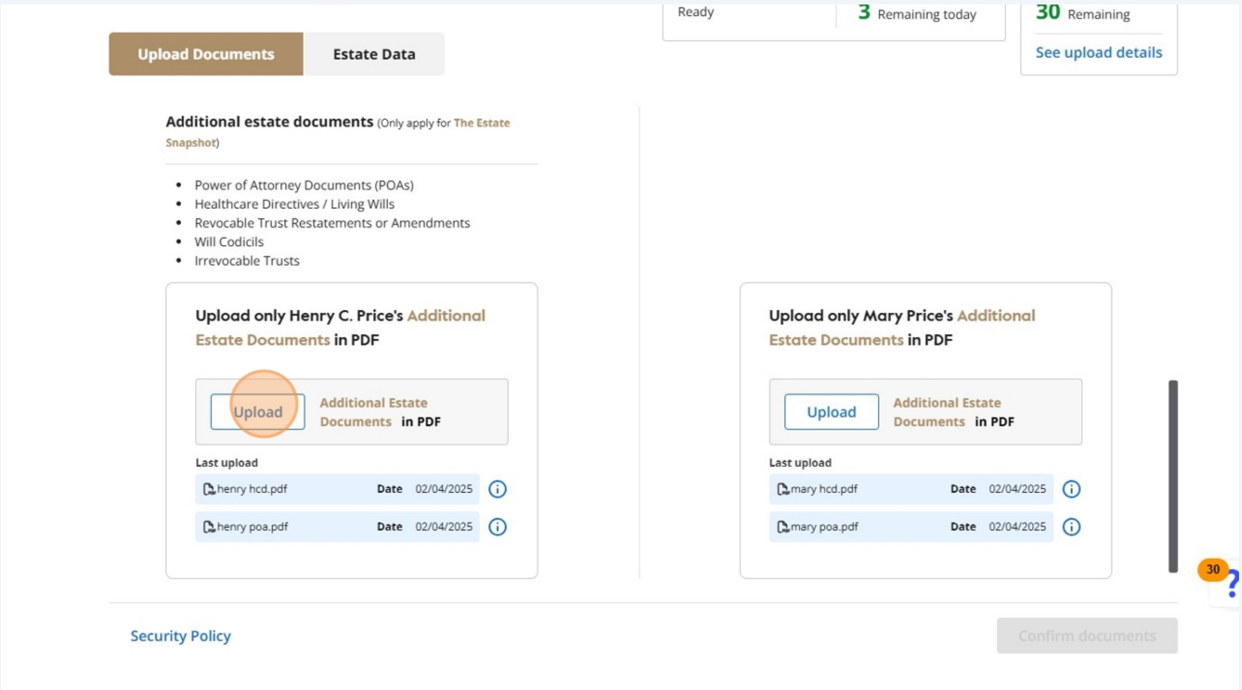
If your clients have individual Revocable Trusts, select "Individual" and upload the client's Revocable Trust here

Repeat this step on the right side of the screen (if applicable) for the co-client

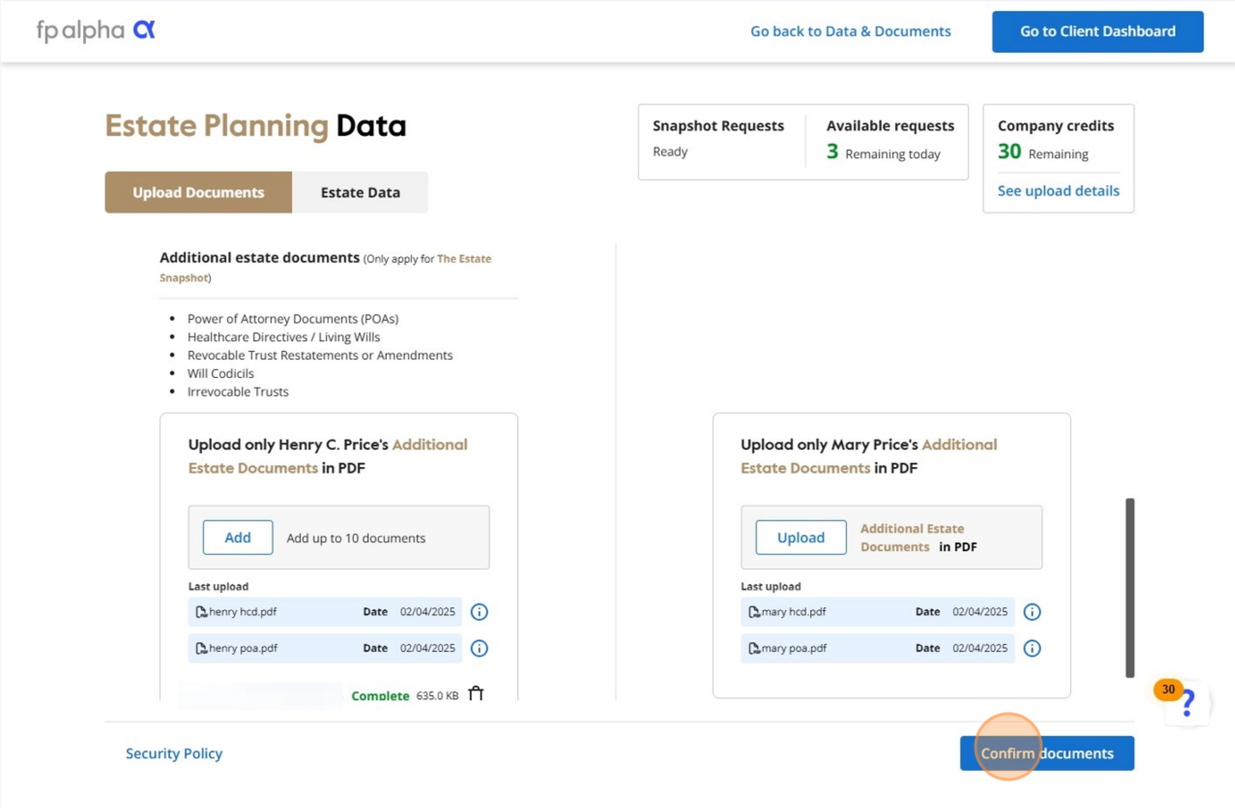


7

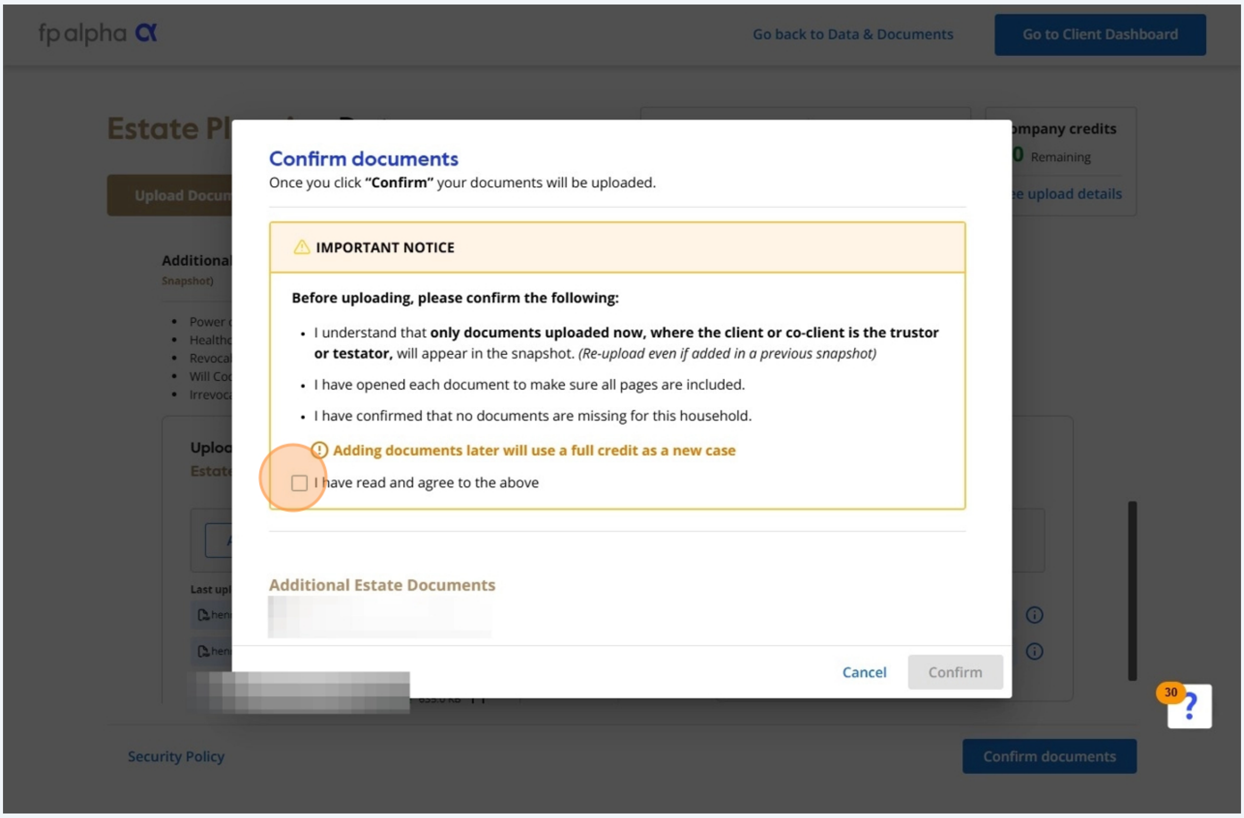
Click "Upload" to include the client's Irrevocable Trusts, Power of Attorney, Healthcare Directive, Will Codicils, Trust Amendments, or Trust Restatements



8 Click "Confirm documents"



9 Click here.


fp alpha
Go back to Data & Documents
Go to Client Dashboard
Confirm documents
Once you click "Confirm" your documents will be uploaded.
IMPORTANT NOTICE
Before uploading, please confirm the following:
I understand that only documents uploaded now, where the client or co-client is the trustor or testator, will appear in the snapshot. (Re-upload even if added in a previous snapshot)
I have opened each document to make sure all pages are included.
I have confirmed that no documents are missing for this household.
Adding documents later will use a full credit as a new case
I have read and agree to the above
Additional Estate Documents
Cancel
Confirm
Security Policy
Confirm documents

10 Click "Confirm"