D|A|DAVIDSON

Client Access Support Team
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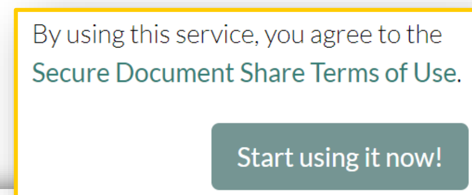
Secure Document Share

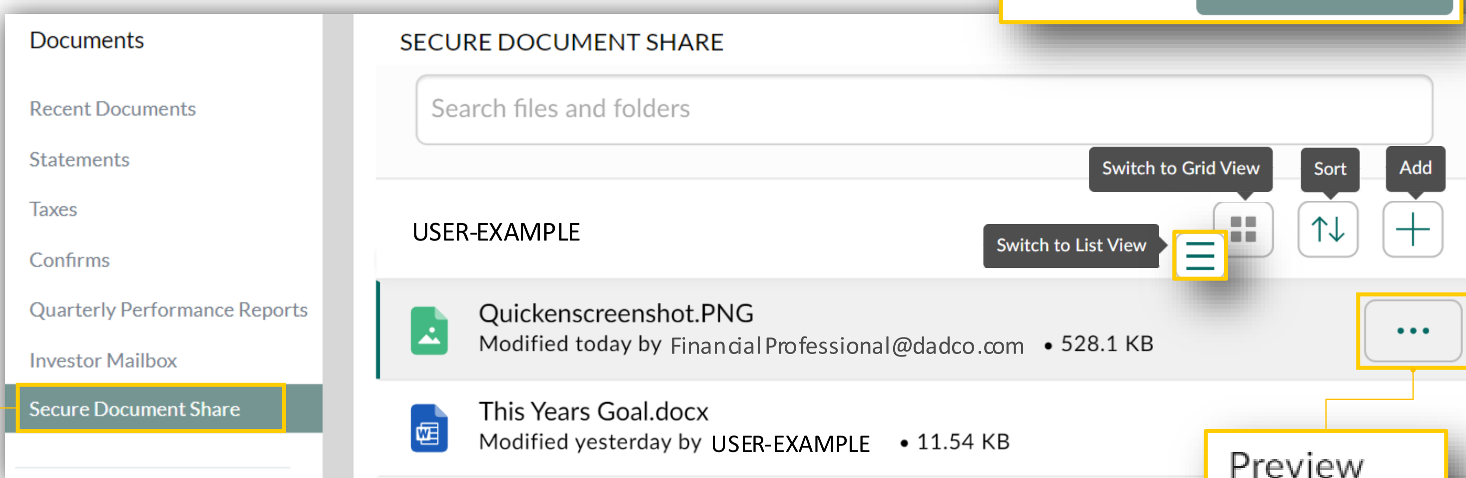
Our Secure Document Share allows you to exchange documents with your Financial Professional securely and directly within Client Access. Sharing documents through this service is simple and provides an additional layer of security when providing sensitive or confidential information such as copies of statements, legal documents, financial planning details, or anything that contains personally identifiable information such as your social security number, address, and account numbers.

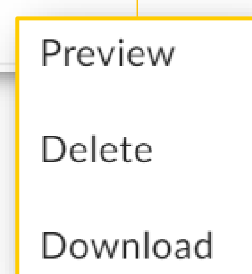
Securely Uploading Documents

Begin by navigating to the "Documents" tab and selecting "Secure Document Share". Please ensure you have read the Secure Document Share Terms of Use prior to using this service.

To share a document with your Financial Professional, click the + plus icon and select "Upload". There you can drag and drop or browse your device for the document you want to share. Once you have selected your document(s), click the "Upload" button.







Document List

Your document list provides access to items exchanged between you and your Financial Professional. The three horizontal dots found on the right allows you to

Additional Details

- Documents will be available for a period of 90 days, after which time they will be removed from Client Access. If you would like to keep a document beyond this period, please save to your personal device.
- You will receive an email notification when a new document has been shared with you. Likewise, your Financial Professional will receive a notification when you share a document with them.