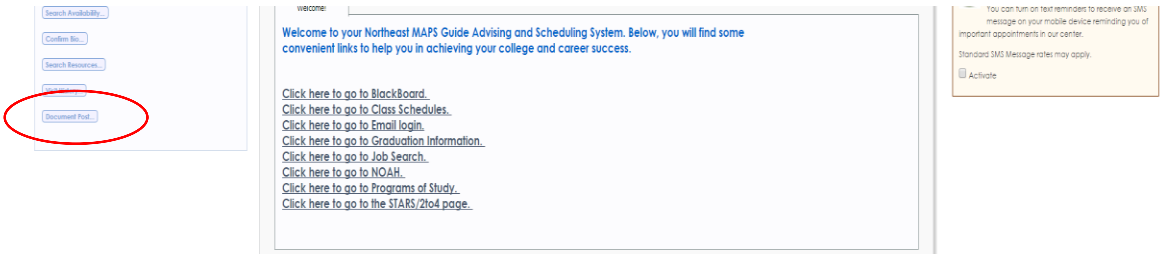
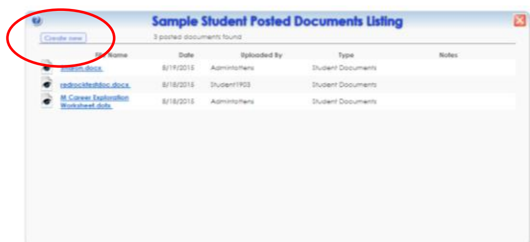
How to Upload Your Document to AdvisorTrac

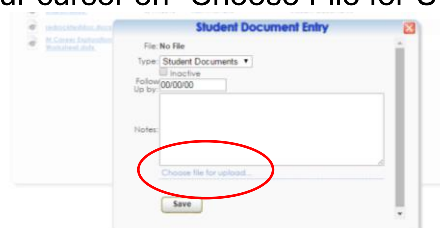
1. Log in to your account.
2. Choose the “Document Post…” tab.



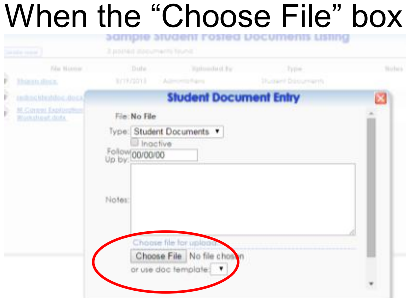
3. Choose “Create New”.



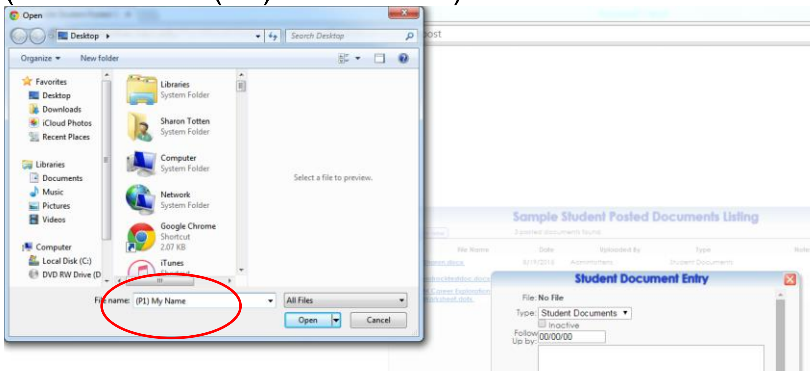
4. Put your cursor on “Choose File for Upload”.



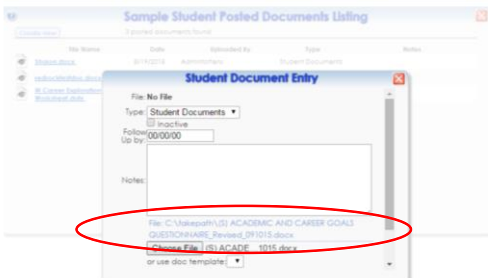
5. When the “Choose File” box pops up, click on it.



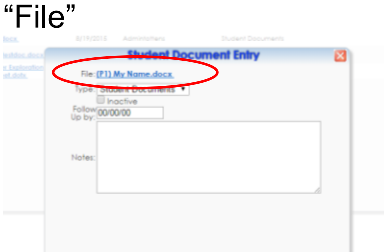
6. Find the file you saved on your desktop by typing the file name in the search box (in the format “(P1) John Smith”).



7. Wait for the name of the file to “pop up”



8. Choose “Upload File”, and you should see your new document next to the word “File”



9. Close out this screen by clicking on the red square with the x in the upper right corner of the page.

10. You have now added your new document to the list! ☺