Sending Confidential Documents

May 2019

It is often necessary to obtain confidential documents from clients to be able to do our job. Some examples of confidential documents that may be needed are:

- Tax returns
- Retirement and brokerage account statements
- Bank statements
- Wills or trust documents
- Social Security statements

Any documents that have account numbers or Social Security numbers are especially of high concern to keep private. To add extra protection when sending confidential documents, we ask that you do not send these documents as normal email attachments. We can assist you in electronically sending these documents in one of two secure methods:

1. Through the online vault within the client portal
2. An embedded Sharefile email link (we can email to you as needed)

Please call if you have any questions with either of these two options.

In addition to sharing documents securely, the client portal gives basic investment information about the accounts that we manage. If you do not already have access to the client portal and would like to, please let us know. The client portal link is also on the homepage of our website in the top right corner.

Keeping your private information secure is a priority of ours and we want to help make it as easy as possible to do so.

Have a wonderful holiday weekend!

The McCarthy Grittinger Team

Scott D. Grittinger, CFP®
Matthew T. Miler, CPA, CFP®
Jacqueline A. Schneider, CFP®
Amy L. Finley, CFP®
Alicia A. Nordwig, AAMS®
Maggie Mayer
Jacob Hornak