

Secure Portal Guide

Lucien, Stirling & Gray Advisory Group, Inc.

Introduction

When using your secure portal to securely share documents between you and Lucien, Stirling & Gray, it is important to keep in mind a few simple tips.

When we send you a report or a document to sign, we will place it in your **Upload** folder. You will then receive an email notification alerting you that the document is there and is ready for your review.

Using your portal to download, sign and return documents

Follow these steps to ensure a document is signed, scanned, and delivered back to Lucien, Stirling & Gray via your secure portal:

1. Download the document you intend to sign
2. Print the document
3. Sign the document
4. There are several ways to move forward after signing. Here are your options:
 - a. Scan the document using a scanner.
 - b. Use a document scanning app on your mobile device. See our app recommendations below.
 - c. **DO NOT** submit a photograph using only your mobile device's camera. The file must be a PDF.
5. Place the document file in your **Upload** folder in your portal.

Important things to remember

1. Do not submit photographs of your documents. Scan the document instead, using a scanner or a scanning app on your mobile device (See app recommendations below).
2. Make sure your document is saved as a **PDF** not a JPEG or HEIC file format. JPEG and HEIC files are image files, not document files. Our custodians often reject image files as not in good order.

Free document scanning apps

If you do not have access to a traditional scanner, we recommend downloading one of the following free scanning apps. These apps do the work for you, using your mobile device's camera to photograph a document and then convert that photograph into a PDF file format that is accepted by our custodians.

Both of the following apps are available for **free download**.



Microsoft Office Lens

Available in Apple App Store for iPhone or iPad and in Google Play for Android devices.

Microsoft Office Lens is especially good if you use Microsoft Office, but does not require familiarity with Microsoft Office in order to be used well.

[Download for Android](#)
[Download for iPhone/iPad](#)



Adobe Scan

Available in Apple App Store for iPhone or iPad and in Google Play for Android devices.

Adobe Scan is great for anyone who wants simple free scanning on their mobile device.

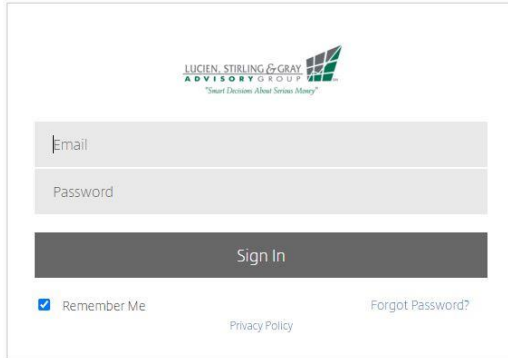
[Download for Android](#)
[Download for iPhone/iPad](#)

If you would like to learn more about your secure portal and how to use it, visit the link below.
<https://citrix.sharefile.com/share/view/s1bff52f8d434781a>

LSG Secure Portal

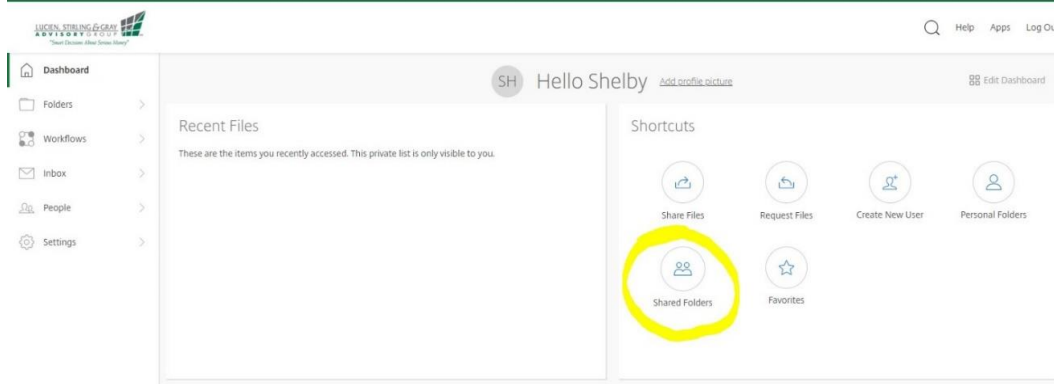
Navigating Your Secure Portal

1. Go to our website: www.lsggroup.com
2. In the top navigation menu click “Client Secure Portal”
3. You will be taken to the secure portal login screen, which looks like this:

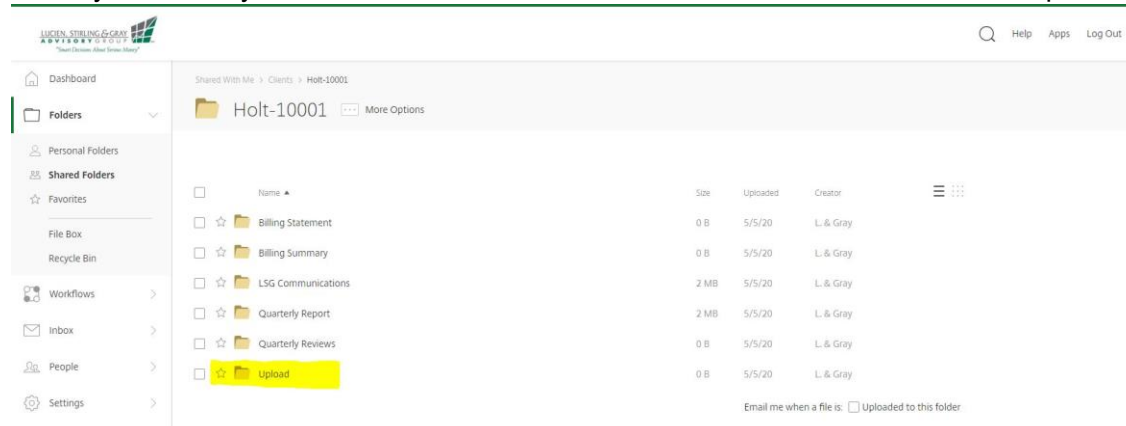


The login screen features the Lucien, Stirling & Gray Advisory Group logo at the top. Below the logo are two input fields: "Email" and "Password". A "Sign In" button is positioned below these fields. At the bottom left, there is a "Remember Me" checkbox. At the bottom right, there is a "Forgot Password?" link. A "Privacy Policy" link is located at the bottom center.

- a.
4. Enter your email address and the password you selected when you activated your portal and Sign In
 - a. If you forgot your password and need a new one, click “Forgot Password.”
 5. After successfully logging in to your ShareFile secure portal, you will be taken to your dashboard. It looks like this:



6. Click “Shared Folders”
7. Next, click on the folder with your last name and client number
 - a. Ex: Holt-10001
8. Within your folder, you will see several additional folders. Click on the folder titled “Upload”

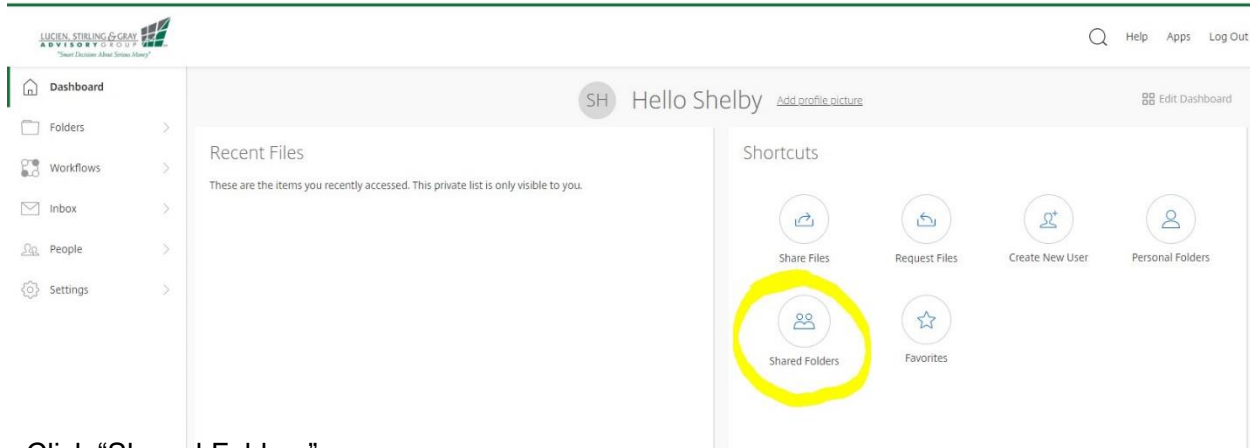


9. The Upload folder is where you will find any paperwork that we have uploaded for you to sign. It is also the folder where you can upload documents back to us securely.

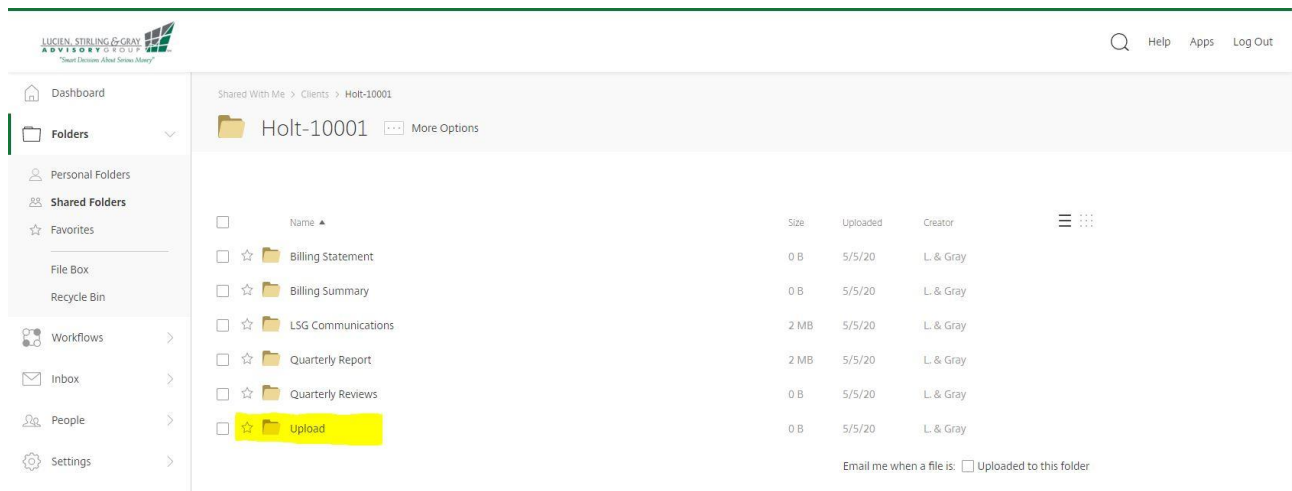
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How To Upload Files to your Secure Portal

1. After successfully logging in to your ShareFile secure portal, you will be taken to your dashboard. It looks like this:



2. Click “Shared Folders”
3. Next, click on the folder with your last name and client number
 - a. Ex: Holt-10001
4. Within your folder, you will see several additional folders. Click on the folder titled “Upload”



5. The Upload folder is where you will find any paperwork that we have uploaded for you to sign. It is also the folder where you can upload documents back to us securely.
6. Click the blue circle plus sign button (see photo below) in the upper right of your screen, click “upload” and then “browse files” to select the necessary files from your computer.



7. When you have finished selecting the files you would like to upload to your portal, click the blue oval button in the bottom left corner of your screen labeled “upload”
8. Congratulations! You successfully uploaded files to your secure portal.
9. Your advisor will automatically receive an email notification telling them you have uploaded files to your portal.