



How to get to the Weatherly Portal

You can navigate to the Weatherly Portal by going to our website, <u>https://www.weatherlyassetmgt.com/</u>, hovering over Account Access, and clicking "Weatherly Client Portal".







Downloading Documents from the Weatherly Portal

Hover over the "Documents" tab on the top ribbon.
a. Select the drop down "Vault"



2. Select the check box next to the document(s) you with to download.

ACTIONS 🗸			
1 SELECTED		ALL DOCUMENTS	
•	Туре	Name/Description	
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- 3. Select the "Actions" tab.
 - a. Select the drop down "Download"
 - b. Alternatively, documents can be download by clicking on the download icon (

ACTIONS 🗸	
1 Post Document	
1 Document Selected for Actions Below	
Download	



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Uploading Documents to the Weatherly Portal

Hover over the "Documents" tab on the top ribbon.
a. Select the drop down "Vault".



- 2. Select the "Actions" tab
 - a. Select the drop down "Post Document"

ACTIONS 🗸				
🍰 Post Document				
No Documents Selected				
Download				

- 3. Click "SELECT OR DROP FILES HERE..."
 - a. This will allow you to search your computer for the document(s) you wish to post
- 4. Click "Post" once complete.

Post Document	×
SELECT OR DROP FILES HERE	

