

Our preferred file format is PDF. Microsoft Word and Excel documents are also acceptable.

### SCANNING

If you do not have access to a scanner, the instructions below will walk you through scanning documents on your Apple or Android devices.

#### How to scan documents on iPhone, iPad, or iPod Touch:

1. Open Notes and select a note or create a new one.
2. Tap the Camera button, then tap Scan Documents.
3. Place your document in view of the camera.
4. If your device is in Auto mode, your document will automatically scan. If you need to manually capture a scan, tap the Shutter button or one of the Volume buttons. Then drag the corners to adjust the scan to fit the page, then tap Keep Scan.
5. Tap Save or add additional scans to the document.

#### How to scan documents on Android device:

1. Open the Google Drive app.
2. In the bottom right, tap Add.
3. Tap Scan.
4. Take a photo of the document you'd like to scan.
5. Adjust scan area: Tap Crop.
6. Take photo again: Tap Re-scan current page.
7. Scan another page: Tap Add.
8. To save the finished document, tap Done.

### SENDING

We have many options available to all clients to send us documents securely. For security reasons, we request that you do not send sensitive data via email.

#### ShareSafe

This option is ideal when only transferring files to your Anderson ZurMuehlen advisor once or twice a year.

- At the bottom of an email from your Anderson ZurMuehlen advisor, click Send a File (orange button at very bottom of email signature), or go to <https://www.clientaccess.com/sharesafe/#/azworld>.
- Enter required information on the first screen.
- Choose Anderson ZurMuehlen employee from drop down list.
- Enter Subject line and Message.
- Click Add Files and browse to find the files you would like to send. (Note: Total upload size per message cannot exceed 1GB and there is a limit of 20 files per message.)
- Once all information is entered, click Send button.

#### Client Portal

Client portals are most often used when files will be transferred back and forth on a regular basis. If only transferring files once or twice a year, see ShareSafe instructions above. Contact your Anderson ZurMuehlen advisor or click the following link to request a client portal if you do not already have one: <https://azworld.com/client-portal-registration>.

#### Accessing and using your client portal:

- From [azworld.com](https://azworld.com), go to Clients menu at the top. Click Client Login.
- In the middle of the page, click Client Portal, or go to [www.clientaccess.com](https://www.clientaccess.com).
- Follow instructions on how to log in and use the portal <https://azworld.com/wp-content/uploads/2018/09/Portal-Instructions.pdf>.

If one of these options do not meet your needs, please contact your advisor on alternative ways to send electronic documents.