

What is SmartVault?

SmartVault is our online document management system designed to provide secure storage, organization, and sharing of files and documents.

Why Should I Use the Secure SmartVault Portal?

Cybercrime activity is on the rise, and email is one of the easiest ways for hackers to get your information. You should never email or text documents that contain sensitive information like your Social Security Number, credit card numbers, or other payment/bank information without using a secure portal. It's also important not to leave papers lying around that contain this information.

How Does SmartVault Keep My Information Secure?

All interactions with SmartVault occur over an encrypted channel, and all documents and information are encrypted using bank-level encryption (that's AES-256 for the tech savvy). No user can access documents in SmartVault without logging in, and built-in security permissions help us control who has access to your information at all times. SmartVault offers Two-Factor Authentication (2FA) to add more layers of security to your account. With 2FA, you log in using not only your email address and password, but also a one-time verification code sent to your mobile device or email address that helps verify your identity. Once you set it up, 2FA is automatically activated if you or anyone else tries to access your account from a new web browser or IP address.

How to Activate Your Account—Initial Use

The first time you have been added as a user, you will receive an account activation email from SmartVault. If you don't see the email in your inbox, please check your spam or junk folder. If you need further assistance, please call the office at 303-988-1411.

1. Open your activation email from SmartVault.
2. Click the SmartVault Activation Link.
3. Enter your phone number and create a password.
4. Click Create My User.
5. A verification code will be emailed to you. This code expires in 10 minutes so please complete this process promptly.

To Sign in to SmartVault

1. On a new browser tab on your computer or phone, go to www.my.smartvault.com or download the SmartVault app on your iPhone/iPad.
2. Enter your email address and the password you created when you activated your account.
3. Click Sign In. If you forget your password, click 'Can't sign in?' and you'll receive an email to reset your password.
4. You may be asked to enter a one-time verification code that will be sent to your email or texted to your phone, depending on how you set up your account. This is Two-Factor Authentication (2FA), and occurs randomly or when signing in from an unknown device as added security.

Uploading Documents–Submitting Your 2024 Tax Information Using a Computer

1. First time? At the Home Page, watch the 3-minute video called “Need Help Navigating?”
2. Ready to upload your documents? Sign in to your SmartVault account (see Page 1). From the Home Page, click Upload Documents. **NOTE:** This defaults to most recent folder used. If you don’t see the folder you want, you can click the blue button that says “View All Folders” for a complete list, including previous years. Pay careful attention to which folder you select—if you have access to multiple Vaults (for family members, businesses, estates, etc.) they all show up here.
3. Hover the cursor over the folder you’d like to select and click the “Upload File” button. For current tax documents, tax year 2024, select “Client Source Documents” for the corresponding account. **NOTE:** It helps to have all your PDFs ready on your desktop or in one folder for easy uploading.
4. Either drag and drop your files from your computer into the box, or click the “Upload a file” button and locate the files in your drive.

Important Things to Note About Uploading Documents

- FSM will automatically be notified when you have added a document to the folder. However, we will wait until you **call/text the word “GO” to 303-988-1411 after uploading ALL of your documents** to get to work on your return.
- You may **not** remove any documents once uploaded, so if you added something erroneously, please call the office for assistance to delete.
- You may also download the **SmartVault app** (available on iPhone only). This allows you to use the phone’s camera to capture images and upload documents directly to your Vault. **Be sure to convert photos to .jpeg or .pdf files**—we cannot read .heic files (the iPhone default).

Downloading Documents Using a Computer–Organizer, Completed Return, W-2’s, etc.

1. Log in to your SmartVault account and click “View Files and Folders”.
2. Select the correct name, tax year, and folder by clicking on the words (not the box to the left)
 - I. **Client Organizer** has your personal organizer with last year’s numbers if you request it.
 - II. **Client Source Documents** has documents you’ve uploaded, pre-processing. FSM has not processed this information yet.
 - III. **Client Original Documents – Processed** has your documents post-processing. FSM will move your source documents into the processed folder to indicate that we have included this information in your tax return, if applicable.
 - IV. **Client Tax Returns** has your completed tax returns once your filings have been accepted by the IRS and state(s).
3. Check the box (or multiple boxes) of the file(s) you want to download and the “Download” box will appear for you to click.

For more detailed instructions on getting started, visit <https://vimeo.com/493784146> for a helpful Getting Started video. If you ever need assistance with your SmartVault account, you can reach out to Support by emailing support@smartvault.com or calling the Financial Security Management office at 303-988-1411.

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