



How to Upload Documents to NetClient Portal

Step 1 Go to www.Portney.com/client-login

Step 2 Authenticate your login with **Multi-factor Authentication** (If you do not use Multi-factor Authentication please go to step 3)

Step 3 On the left-hand side of your screen under the **Documents** section – click **File Exchange**

Step 4 Once you are in File Exchange, click – **Information Upload to Portney**

Step 5 Once that folder opens, click **Upload**

Step 6 Click add files or drag and drop files into the folder.

Step 7 Click **Start Upload**

Once upload is complete. Sign out of your portal. An email will be sent to Portney notifying us that you recently uploaded information.