Send a File Using Sharefile

SHAREFILE ENABLES YOU TO SEND DOCUMENTS SAFELY AND SECURELY

To use Sharefile, follow these steps:

1

Visit Website

- Visit your Retirement Plans website.
- At the bottom of the page, you will find a link that says **Need to send us a large file?** Click this link.

2

Complete Form

- Complete all of the requested fields marked * on the entry form.
- Check the box labeled Remember Me. If you would like to save your information.
- Once you have completed all of the all of the fields, click the green Continue button.

3

Upload File

Choose your recipient from the drop down box:

- For Enrollment Forms choose Retirement Services.
- For Distribution Forms choose Distribution Group.
- For Loan or Hardship Paperwork choose your Account Manager.
- Select Choose Files. This will take you to your computer files. After selecting your file(s), click Open. Your file(s) will appear in the box.
- Once you have selected your file(s), click the green Upload button.
- You will receive a confirmation email when you've finished.