

Secure Client Portal Technology



We use the **latest document collection technology** to make it **easy for you** to return the information to us, and **keep it secure** out of email inboxes

Complete everything...



Faster

Upload from any **device including phone cameras**.
Send files too big for email.



Easier

Simple instructions and easily see your progress.
Built in messaging and notifications.



Safer

Your files are **securely transferred with bank grade technology**, then locked!

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Access your portal by following your link

Hi James, Bob Smith needs you to upload information. Bob needs this before 21 May 2019. To complete this information, please click the button below:

[Click To Get Started!](#)

Message from Bob Smith

Hi James

We just need to get some further information off you in order to process your application. If you can supply all the information requested below by the due date that would be great. Any questions please feel free to let me know.

Thanks

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Open each item for simple instructions

Required information	
1	Required Item 1 COMPLETE open ✓
2	Required Item 2 open →
3	Required Item 3 REVISION NEEDED open ✗
4	Required Item 4 open →
5	Required Item 5 close ←

Click the **Upload Files** button to supply copies of all the required items

[Upload Files](#) [Type Note](#) [Save](#) [📄](#)

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Upload information required, even sign off paperwork digitally

Fill Form

[Draw](#) [Type](#) [Upload](#)

[Clear](#)

B.Smith

This document can be signed electronically. Please draw your signature in the box and click sign. You can also type or upload your signature as alternative ways to sign.

[Cancel](#) [Sign](#)



We'll send you a link to **Get Started!**