



SecureDrawer™



E-FILE CABINET & SECUREDRAWER

HOW TO SETUP YOUR ACCOUNT –

- **IMPORTANT! - Our staff will assist you with this over the phone.**
- **STEP 1** - Open the email invitation received from the staff member assisting you with setup.
- **STEP 2** - Click the “Get Started” link in the email and type in a password to use. Give that password to the staff member assisting you for us to store on your secure password doc at our office in case you lose or forget your password in the future.
- **STEP 3** – Login with your designated email (user id) and password (created by you) at the link app.securedrawer.com and click login.
- **You are now setup to pass documents back and forth using Secure Drawer.**

HOW TO LOGIN TO YOUR ACCOUNT –

- **IMPORTANT! – You must have first setup your account with one of our staff members (See Above).**
- **STEP 1** – Go to www.kfreemanfinancial.com → Click either office location to go to the home page.
- **STEP 2** – On the home page, Click the “Client Portal Login” link to go to app.securedrawer.com.
- **STEP 3** – Login with your designated email (user id) and password (created by you) and click login.
- **Step 4** – Click the drop-down arrow next to your SecureDrawer folder on the left navigation menu to see the available years to access or share documents.
- **Step 5** - Click the drop-down arrow next to the Year you wish to access or share documents to see either the Tax & Accounting Documents or Investment Documents folders. Access or Share documents to the appropriate folder by clicking the upload arrow icon to the right of each folder.

The screenshot displays the SecureDrawer web interface. At the top, there is a dark blue header with a hamburger menu icon, the 'k' logo, and 'New' and 'Edit' dropdown menus. Below the header is a navigation bar with a home icon and a briefcase icon. The main content area is split into two panes. The left pane shows a file cabinet view with a search bar and a list of folders: 'Karen Freeman Consulting & Accounting', 'LAST NAME, FIRST NAME (email@email.com)', '1Permanent Document Storage' (with sub-folders for Business Formation & Legal Documents, Identity Docs, Mortgage, Loan, Debt Agreements & Amortization Tables, and Wills, Trusts, Estate Planning), and years 2016, 2017, 2018, 2019, and 2020. The 2020 folder is selected. The right pane shows the contents of the 2020 folder, including a breadcrumb trail 'Home > Karen Freem... > FREEMAN, JA... > 2020'. It lists two folders: 'Investment Documents' and 'Tax & Accounting Documents', both with the email 'brantleyfreeman@kfreemanfinancial.com' and the date '11/2/2020'. A search bar and a 'Type' dropdown are visible above the folder list.

DOWNLOAD THE EFILE CABINET SECURE DRAWER MOBILE APP –

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- **STEP 2 –** On the home page, Click the “Client Portal Login” link to go to app.securedrawer.com.
- **STEP 3 –** Click the appropriate mobile app store link to be redirected to the Efile Cabinet mobile app download → Download the app to your mobile device.
- **Step 4 –** Click the Efile Cabinet app to open it and Login with your designated email (user id) and password (created by you) and click login.
- **Step 5 –** Establish a 4-digit Passcode on your E-File Cabinet mobile app login for future use. Your mobile app will refer to this 4-digit code in place of your password when accessing on your mobile device.

