SENIOR FINANCIAL CONCIERGE SERVICES

How to Scan and Upload Documents to Your Family Ready File

Use your phone to make a readable PDF, then send it through the SFCS website. You keep all original documents.

1 Prepare your pages

Place pages flat on a contrasting surface in bright, even light. Avoid shadows and glare. Scan **one document at a time**, including backs with information.

2 Scan with your phone

iPhone using Files: Open Files, tap **Browse**, then **More (three dots) > Scan Documents**. Hold the phone above the page; capture automatically or tap the shutter. Adjust corners if needed. Scan the remaining pages, then tap **Done or Save** and choose a folder.

iPhone using Notes: Open a new note. Tap the **attachment (paperclip) > Scan Documents**. Capture each page, then tap **Done or Save**. Open the scanned attachment, tap **Share > Save to Files**, and save the PDF where you can find it.

Android using Google Drive: Open Drive in your own account. Tap the **camera**, or **+ > Scan**. Capture the page and adjust the crop. Tap **Add (+)** for more pages. Tap **Done**, name the file, choose **PDF**, select a private folder and tap **Save**.

Screens and button names vary by phone and app version. Keep all pages of the same document together in **one multipage PDF**.

3 Check and name your PDF

Open the PDF and zoom in. Can you read small print, dates and signatures? Check every page is upright, in order and fully visible, with no blur or cut-off edges. Retake unclear pages.

Use a simple name such as **Homeowners_Insurance_2026.pdf** or **Bank_Statement_2026-09.pdf**. Keep account and Social Security numbers out of filenames.

4 Upload securely to SFCS

Open Client Resources on the SFCS website and request your private upload link by email. Use the link SFCS provides to select your PDF from Files, Drive or Downloads, then submit. If Drive is unavailable in the file picker, download the PDF first. Wait for the success message. If it fails or looks unfamiliar, contact SFCS using your usual contact information.

Protect your private information

Send only documents SFCS requests. Never send passwords or security codes, or sensitive files by ordinary email or text. Use your own locked device and private folders. Drive saves scans online; Notes and Files may sync to iCloud. After SFCS confirms receipt, review extra device and cloud copies with SFCS before deleting anything.

Prefer paper or need help

Keep using your **physical Family Ready folders**. Contact SFCS to arrange help or a paper review. **Original documents remain with you**; keep them in a safe place.