

Our Service Guide to Your Portal

Frog Financial Management

Make the leap to a better life



Frog Financial Management use a secure encrypted Client Portal service to allow you to safely share documents and any personal information.

The Client Portal uses the same high-level encryption and security measures used by banks and other financial institutions, so you can have peace of mind that your information is safe with us.



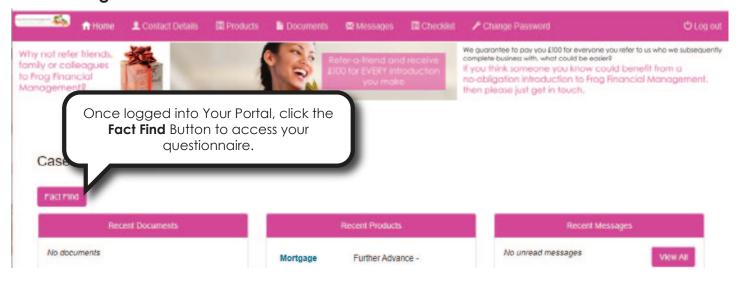
Frog Financial Management

Make the leap to a better life

You can access Your Portal at any time by selecting YOUR PORTAL on our website at: frog-financial.co.uk

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2. Accessing the Fact Find



3. Completing the Fact Find





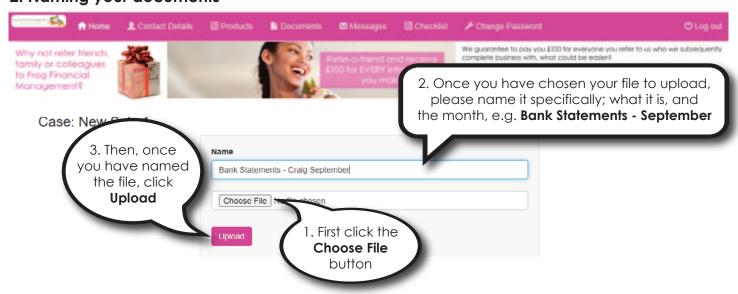
Document upload. Upload documents to the Portal and we will receive notifications, making processing faster and more concise.

Uploading your documents to the Portal is the fastest, easiest and most secure way of sending us any documents we need.

1. Uploading documents



2. Naming your documents





Scanning Guide. You can photograph documents using your phone or tablet, but these must be good usable quality, otherwise they will be rejected.

Use your phone or tablet to capture images and automatically transform them into high-quality PDFs with **Adobe Scan**, the **free** scanning App.



Download for free at the App Store or Goggle Play Store.

This App delivers quality copies of documents, by automatically removing shadows, highlights, whilst avoiding camera flashes or light glare that can obscure data.

Important initial setup:

The App has an option to include text recognition for all documents converted to PDF. Turn this feature off in 'Settings', then in 'Preferences', then 'run text recognition' as it speeds up file saving.

Using the App:

Include all four corners of the document and ensure the edges of the document are not cropped or cut off.

Lay the document on a flat surface and take the image from a birdseye view.

Make sure no objects (hands/fingers/pieces of paper, etc) are obscuring any information if you need to hold them down/open.

You can copy multiple pages of a document and bind them into one PDF, such as multiple pages of a bank statement, etc. Easily preview, enhance, crop, and rotate to fine-tune your scans.

Please note, do not upload Zip or similarly compressed files to the Portal, as the system does not support these file formats. The system is entirely secure with end-to-end encryption.

Below is an is an example of an acceptable scan and to the **right** an unusable image.





