WELLS FARGO Advisors

Wells Fargo Wealth Management Document Center

With Wells Fargo Document Center, you will be able to transfer files to your Financial Advisor teams in a safe and secure manner.

You and your Financial Advisor team can access the Document Center to retrieve any documents which you have shared with one another at any time – making it an effective way to manage your relationship and retain important documentation.

When a document space is created by your Financial Advisor team, they will send a welcome email for you to access the document center.

Once the welcome email is received, you can follow the link to the Document Center login page.

Here you will need to enter your Online credentials to enter the document center.

Once logged in you will be able to see everything that your Financial Advisor team has shared with you.

Documents like tax forms, planning worksheets, external statements and financial reports will now be available to download at any time.

Each time an upload is made by your Advisor Team, a notification will be sent to your email.

This will also provide a link to access the document center.

You will also be able to share documents with your financial advisor team.

- To do this, Select Add files
- Select the advisors you would like to share the file with
- Select the files you would like to share.
- Select upload, and your files will be available within Document Center for both you and your FA team.

There are a few other features including:

- Share: you can share with other Financial Advisor teams if applicable. This is available after the initial upload.
- And, Archive: To remove documents that are no longer relevant

For any additional support, please contact us by calling 1-866-232-4577, 8 am – 11:59 pm EST, Monday to Friday, except federal holidays.

Thank you for your interest in the Document Center. Connect with your Financial Advisor today about using Document Center to transfer files in a seamless and secure way.