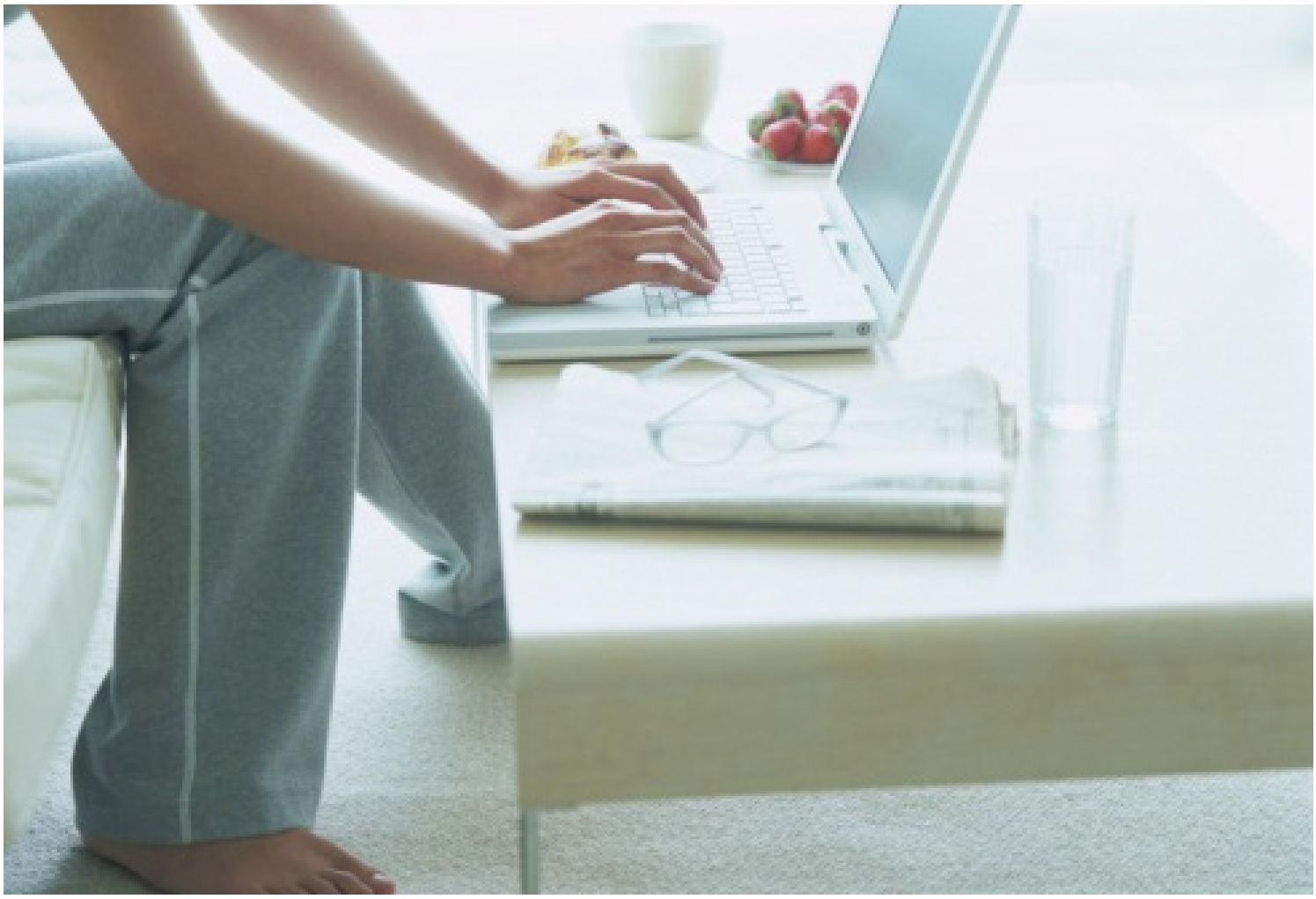
WELLS FARGO

Wells Fargo vSafe®

User Guide



Together we'll go far

Your Wells Fargo *vSafe*® User Guide

The vSafe® Service is an online storage solution that gives you secure file storage, templates for collecting key records you never want to lose, and the option to automatically archive your Wells Fargo account statements.

Quick Links

- An Overview of the *vSafe* Service
- Getting Started with the *vSafe* Service
- Organizing Your *vSafe* Account
- Getting Copies of Paper Documents into Your *vSafe* Account

An Overview of the *vSafe* Service

What are the benefits of a *vSafe* account?

Besides providing secure backup for your personal, financial, and business records, your *vSafe* account can help you through a wide range of situations.

Preparing for an emergency

Prepare for a hard drive crash, lost wallet, fire, or other emergency by storing backups of the information you would need to recover.

Job hunting

Keep a copy of your latest resume, references, and work portfolio secure and readily available when new opportunities arise.

Traveling

Gain peace of mind by knowing you have 24 hour access to a copy of your passport, insurance policy, itinerary, and other information from any Internet connection.

Expanding your family

Organize your important documentation, such as copies of birth and marriage certificates, wills, and baby photos.

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What makes the *vSafe* service so secure?

- Your *vSafe* account is protected by robust encryption and regular backups.
- Advanced Access is an additional layer of protection for your *vSafe* account—just another way we verify your identity.
- For your privacy, Wells Fargo employees cannot access any files uploaded to your *vSafe* account except in the case of legal process (such as subpoenas or court orders).

Accessing Your Account

Accessing your *vSafe* account is easy through Wells Fargo Online® Banking.

- Sign on at wellsfargo.com.
- Select the Wells Fargo *vSafe* tab.
- Enter your Advanced Access code.

How much does a *vSafe* account hold?

Storage plans start with the 1 gigabyte (GB) plan, which holds 10,000 Microsoft Word documents. If you require more space, you can easily upgrade.

1 GB		3 GB		6 GB	
10,000	Microsoft Word docs	30,000	Microsoft Word docs	60,000	Microsoft Word docs
2,000	PDFs	6,000	PDFs	12,000	PDFs
650	digital photos	1,950	digital photos	3,900	digital photos

Getting Started with the *vSafe*® Service

It's easy to get started with just a couple of clicks. Your *vSafe* account comes with Document Assistant and other tools to make securing your information a breeze. Just follow these 3 easy steps.

1 Using the forms in the Document Assistant, add personal information so you're ready for everyday emergencies and extraordinary circumstances.

- Protect yourself if you lose your wallet.
- Inventory your possessions in case of a future insurance claim.
- Save your password hints in case you forget them.

When you are finished completing a personal form, you can save the PDF directly to your *vSafe* account and make changes whenever you like.

A. To choose a Personal Form to complete, select the **Document Assistant** tab.

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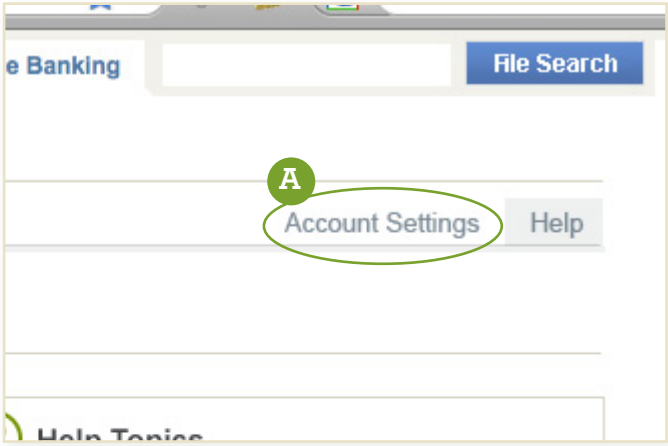
2 Automatically upload Wells Fargo account statements so you have a permanent archive.

Your Wells Fargo electronic account statements are not permanently available through *Wells Fargo Online*, so creating an archive gives you easy access whether applying for a loan or filing your taxes.

The first 24 months of Wells Fargo account statements don't count against your storage allotment.

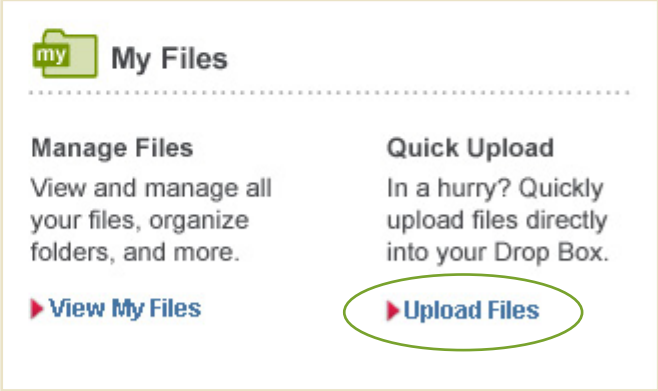
A. Select the **Account Settings** link. After Wells Fargo Statement Preferences, select **Update**.



3 Upload additional files for secure backup and anytime access.

We recommend uploading a copy of the documents listed below

- Resume
- Household budget
- Tax returns
- Credit report
- Portfolio of prior work
- Letters of recommendation
- 401(k) statements
- Wedding photos
- Grandma's recipes
- Year-end statements



How to Upload Files*

To upload files from your computer to your *Wells Fargo vSafe* account, click the **Upload Files** link on the *vSafe* My Files or home page. Depending on what web browser you are using and whether you have the Adobe® Flash™ Player installed, you will see either the **individual file uploader** or the **multiple file uploader.**

Individual file uploader (uploads files one at a time)

- Choose to upload your file to your current location, or you can select the **Change Folder** link to choose a new location, or create and name a new folder.
- Click a **Browse** button to choose your first file.
- Choose your file and select **Open**
- Click the next **Browse** button to choose another file.
- To upload more than three files at a time, click **Add More Files** to add more rows. You can upload up to 10 files each time.
- Once you have added all the files you want to upload, click the **Upload** button.

Multiple file uploader (uploads many files at one time)

- Choose to upload your files to your current location, or you can select the **Change Folder** link to choose a new location, or create and name a new folder.
- Click the **Add Files** button to choose your files.
- Choose your files. To select multiple files, hold down the Control key (Command key on a Mac). You can upload any size file up to a maximum of 250 megabytes.
- Click **Open.**
- Click the **Upload** button to upload all files. You will see the progress bar for each file being uploaded.

** Use IE and Adobe Flash™ Player to get the best experience uploading files.*

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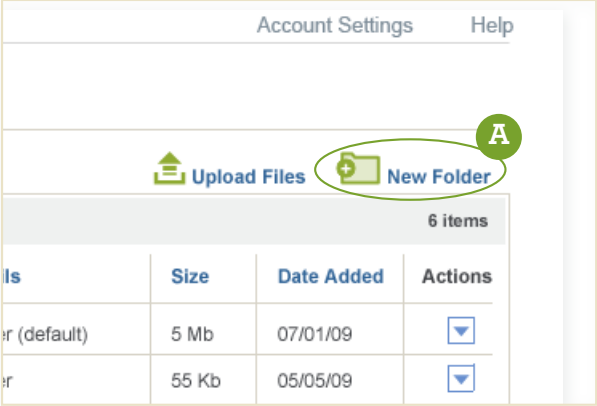
Organizing Your *vSafe*® Account

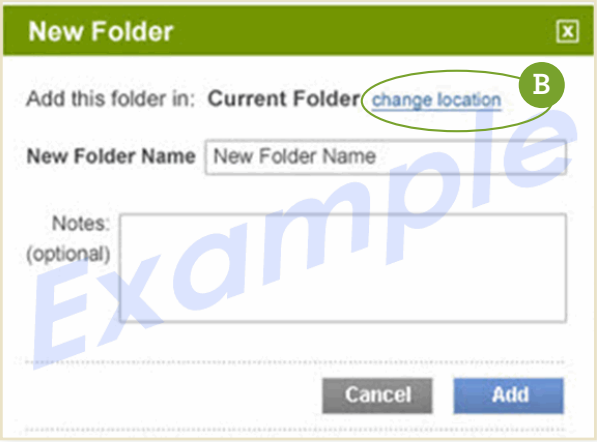
Your information lives in folders within the **My Files** list. We provide built-in folders to get you started, and you can easily create new folders to organize your files.

Create New Folders

A. Select the **New Folder** link on the My Files page. A "New Folder" pop-up window will appear.

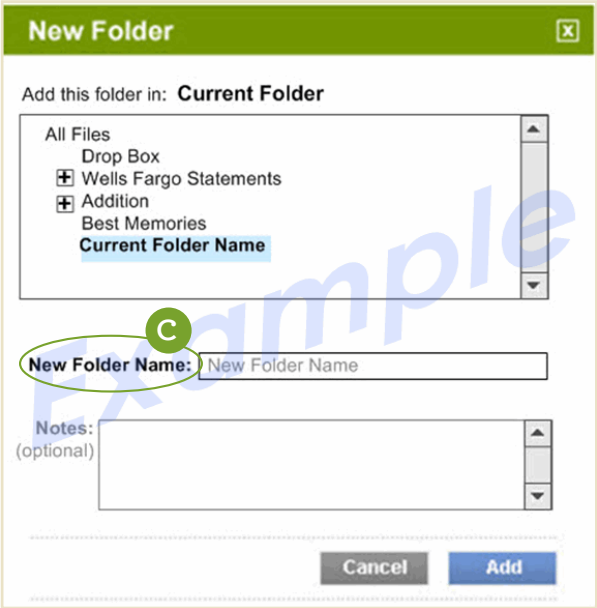


B. If you want your new folder to "live" somewhere other than your current location, select the **change location** link and choose a new location.



C. Name your folder, and add notes if you like.

You have the option to add notes for your folder. A folder for Tax Season might include the names of the copies of documents that you put in the folder, like "invoices, receipts, and W-2 forms."



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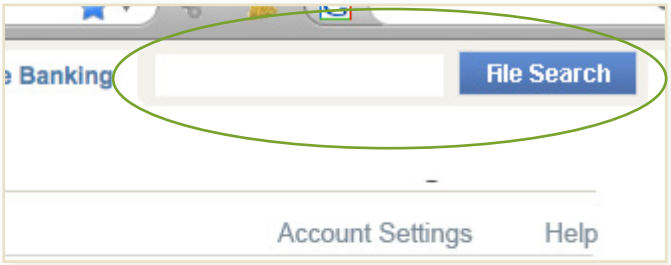
Search for Files

Your *vSafe* account comes with a handy search feature to help you locate important files at a moment's notice.

To make searching for documents easier, add keywords to the notes of files by clicking **My Files**, and selecting **Notes** next to the files you want to make more searchable.

Get more information on improving your search results in the vSafe Help Topics.



Getting Copies of Paper Documents into Your *vSafe*® Account

Need help getting an electronic version of an important paper document? Use these tips to get started.

Ask for an electronic version

Many everyday documents come in electronic form. Ask your tax advisor to give you electronic versions of your tax returns and other tax information and your insurance company to send you a digital version of your policy so that you can easily upload them to your *vSafe* account.

Upload a picture

Take a picture of your passport, driver license, social security card, and other key personal information with a digital camera and upload to your *vSafe* account for access in an emergency.

You can also use the personal forms in the Document Assistant to store information about your wallet/purse/briefcase contents, significant purchases, and more.

To keep your image file size small, we recommend using a photo-editing program like iPhoto or Adobe® PhotoShop® to save your images at a lower resolution before uploading them.

Fax paper documents to yourself via a secure e-fax service

Sign up for an electronic fax account and fax your documents to yourself—they are automatically formatted as PDF documents that you can easily upload to your *vSafe* account.

Use a scanner

Most home printers are also scanners. Carve out some time to get organized and scan your top 10 most important paper documents, like your birth certificate and marriage certificate, and then upload them to your *vSafe* account.

Preserving Your Paper Originals

Your *vSafe* account provides a secure place to store copies of documents for handy reference and in case the originals or other copies are lost or destroyed.

For certain kinds of signed or valuable paper documents—such as wills, deeds, trusts, stock certificates, passports, and powers of attorney, for example—an electronic copy often does not have the same legal effect as the paper original.

However, if you have the copy, it can often expedite the process of getting the original reissued or replaced.

Always keep and protect your signed or valuable paper documents. If in doubt, consult an attorney before destroying any original paper documents.

Still Need Help?

Visit the ***vSafe* Education Center** at wellsfargo.com/vsafe, where you can test drive the service and watch videos to get ideas on how to use your account.

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