

# Cover & Rossiter's Secure File Sharing Method

ShareFile, a Citrix product, is Cover & Rossiter's preferred method for sharing all types of files (Excel, Word, PDF, QuickBooks, .jpeg, etc.). We recommend that you avoid emailing unsecure files that contain sensitive data, i.e., your SSN, date of birth, EIN, address, passwords, banking information, etc.

## Uploading and Sending a file is easy!

- ◆ Open a web browser (Google Chrome, Internet Explorer, Safari, Firefox)
- ◆ Browse to [www.CoverRossiter.com](http://www.CoverRossiter.com). Click on **Client Support / Secure File Sharing**
- ◆ Click the **File Upload** button to open new window to upload your file(s). \*Note: Make sure pop-ups are not blocked so this window opens.
- ◆ Complete the required fields (*image 1*), drag file or browse to select your file(s) (*image 2*), click **+Add more** to add more files (*image 3*), and click the **UPLOAD** button (*image3*).

For assistance, call us at (302) 656-6632, or call ShareFile support 24/7 at (800) 441-3453.

Recipient\*

Email\*

First Name\*

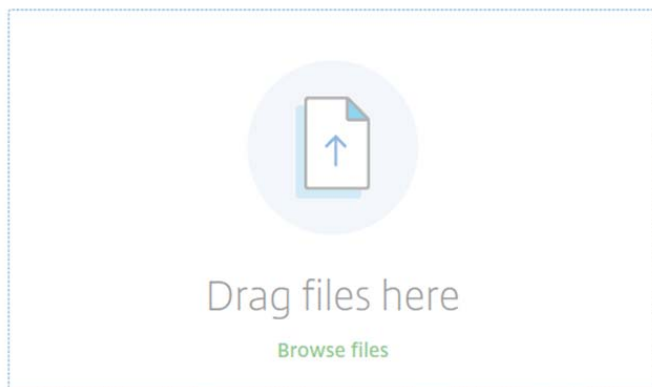
Last Name\*

Company\*

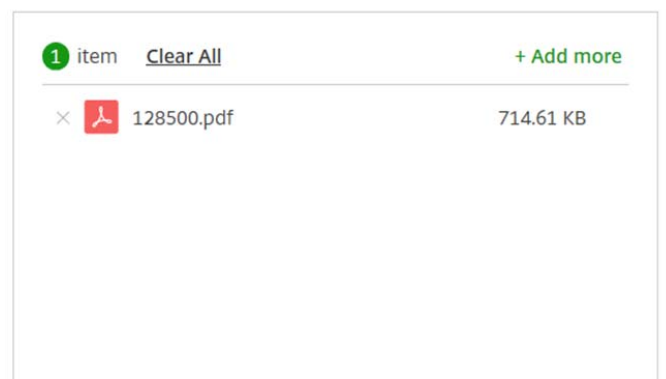
(image 1)

Address of C&R person you are sending document(s) to. Click **VERIFY**.  
NOTE: For tax docs, please use [intake@CoverRossiter.com](mailto:intake@CoverRossiter.com) as the Recipient.

Your information is entered here.



(image 2)



(image 3)