



O'Keefe Stevens Advisory, Inc.

How to Access Your Secure ShareFile Portal

Your advisor at O'Keefe Stevens Advisory may send secure documents or request files through ShareFile. Follow the steps below to create your account and log in to access your secure document portal.

What is ShareFile?

ShareFile is a secure file-sharing platform that allows our firm to safely send and receive sensitive documents. Instead of sending documents through regular email, ShareFile protects your information using secure encryption and a private client portal. Through ShareFile you can:

- Safely upload documents to our team
- Download documents we send you
- Access files anytime from your secure client folder

Set Up Your ShareFile Account

1. Open the email invitation you received from O'Keefe Stevens Advisory through ShareFile.
2. Click the link that says 'Create Account' or 'Activate Account'.
3. You will be directed to a secure ShareFile page.
4. Create a password for your account.
5. Confirm your password and complete the setup process.
6. Once finished, your ShareFile account will be activated.

Log Into ShareFile

1. Go to the ShareFile login page from your invitation email or your saved bookmark. Or [click here](#) and enter the domain okeefestevensadvisory. You will then be redirected to the login page.
2. Enter your email address.
3. Enter the password you created when setting up your account.
4. Click 'Log In'.
5. You will be taken to your secure folder where you can upload, download, or view files.

Helpful Tips

- If you forgot your password, click the 'Forgot Password' link on the login page.
- If a document opens in 'view only' mode, download it to your computer, edit it, and upload the updated version.
- For the best experience, use an updated browser such as Chrome, Edge, Safari, or Firefox.