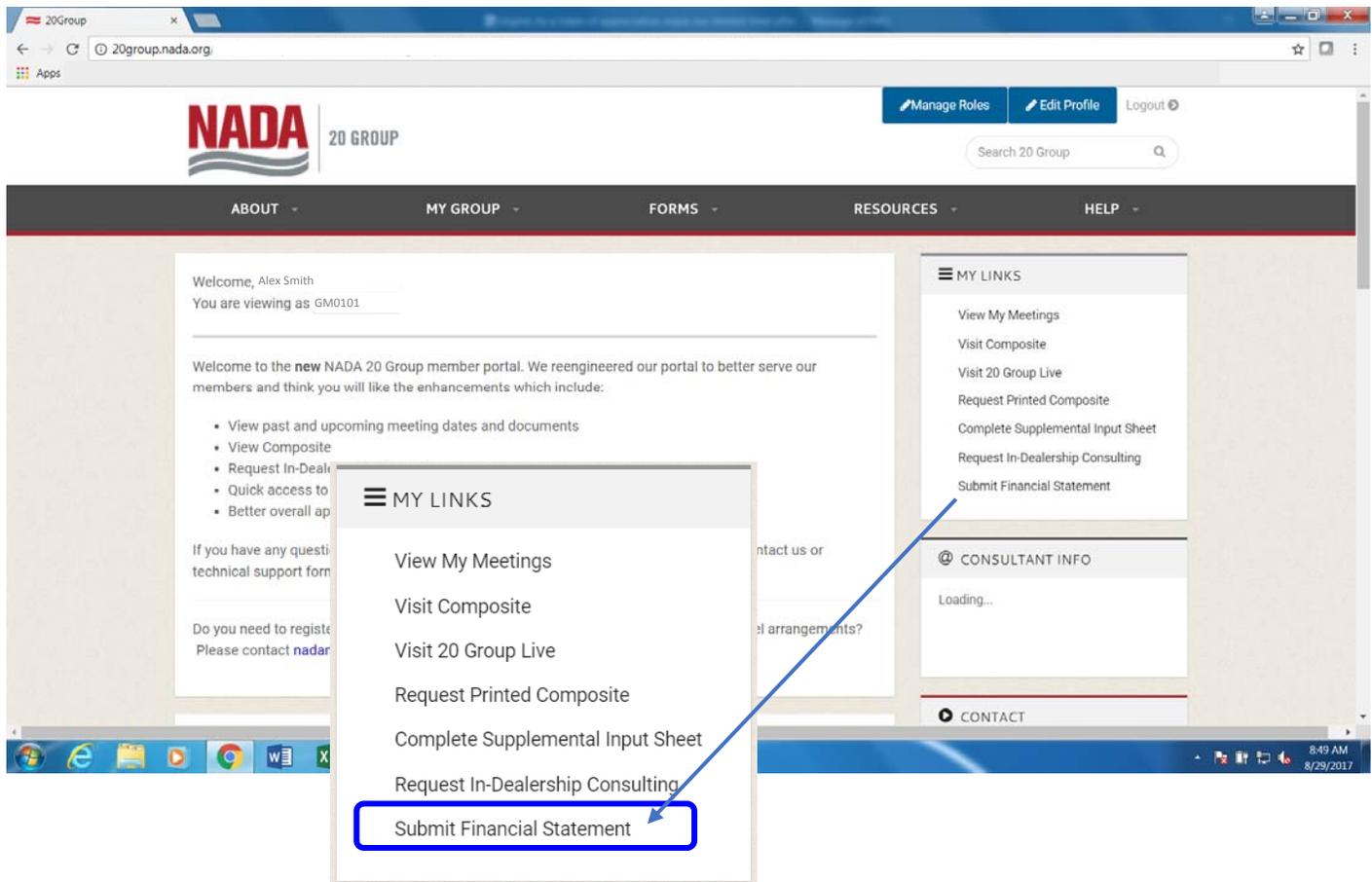Financial Statement Portal - Click the "Submit Financial Statement" link to send your monthly financial statement to NADA 20 Group to be processed in your composite.

The next screen is the portal to upload your financial statement. The options will default to the most current year and month. If you need to upload previous statements, select the Statement Year and Statement Month.

The Fiscal Month should match the number of months reported on the YTD side of your statement. If you are on a calendar year, then July = 7 months.

Then click Choose File to browse your computer to select your statement file and hit Submit. Your statement file must be either a PDF or Excel file (Disable Excel macros, if applicable, before uploading).