



Client Data File Submissions

By utilizing Pinnacle Financial Services' secured website to upload all of your data files, you can protect your clients, and your organization, from the unauthorized exposure of sensitive data. Our website is secured with the strength of VeriSign® Digital Certificate technology in order to ensure the highest level of privacy and avoid the threat of potential identity-theft or other fraudulent exploits carried out by unauthorized third parties. Please follow these instructions to maintain the integrity and privacy of the data being transmitted when submitting files to Pinnacle.

File Submission Procedure

To securely submit a file to Pinnacle Financial Services through the World Wide Web, you must navigate to the web address <https://www.pfslink-e.com> in your web browser.

When prompted, enter the correct user name and password (provided by PFS) and click "OK".

User name: *(contact pinnacle)*

Password: *(contact pinnacle)*



Pinnacle

Financial Services, Inc.



Once logged on, you will find the navigation menu on the left of the main page. Click on the "Upload" button to proceed to the contribution file upload page.

Complete the "Upload File" form with the correct Plan ID/PEO code (provided by PFS), accurate Pay Dates and a valid email address (used to send a confirmation of your transmission).

Use the "Browse" button to navigate to and select the file you wish to submit.

Finally, click the "Upload!" button to upload your file to Pinnacle.

UPLOAD FILE

Planid or PEO :

Pay Period From: / / mm/dd/yyyy

Pay Period To: / / mm/dd/yyyy

Select a file to upload:

Your email Address:



After clicking the “**Upload**” button a message will appear informing you of the completion of the file transmission. Once the file has been validated by the automated file processing system at Pinnacle, you will receive an email message confirming the successful submission of the file.

In some instances the transmission of the file cannot be completed. A messaging indicating this condition will appear after clicking the “Upload” button. Please follow the error message instruction to rectify the issue. Once the instructions have been carried out you should attempt to resubmit the file following the same procedures presented above.

Contact Us

Do you have additional questions or need clarification?

If you require assistance, please contact Pinnacle Financial Services. Our helpful staff will be happy to assist you with the file submission process.

Pinnacle Financial Services, Inc.

Client Services

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