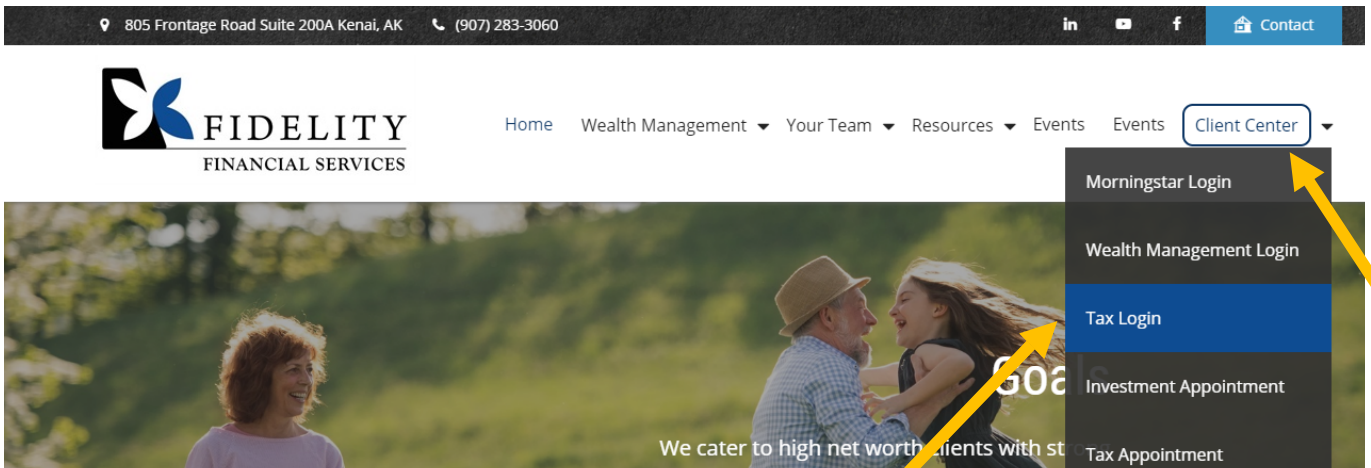


How to Login to Your Tax Portal

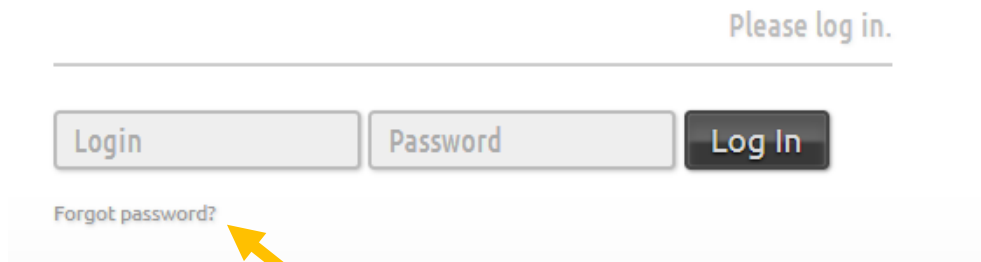
Home Page

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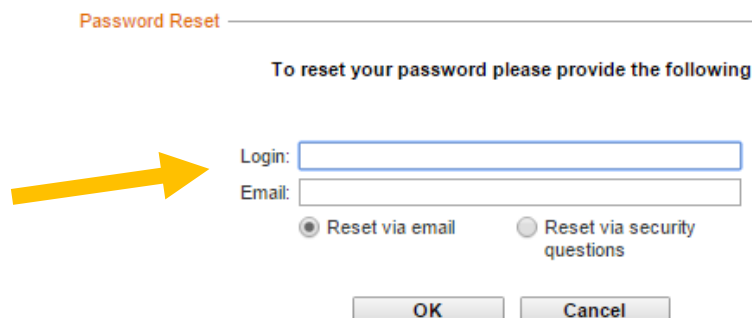
From the **“Client Center”** dropdown, click on **“Tax Login”** to access your secure portal.

Login Screen



“Forgot Password?” – Click here to change your password.

Forgot Password Screen

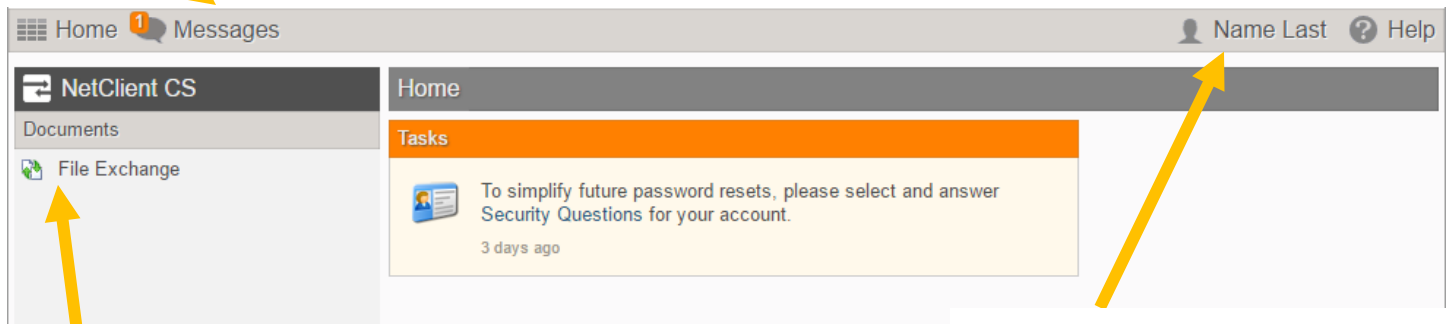


Please Note: The password reset code emailed to you **cannot** be copied and pasted. It has to be hand-entered (typed-in).

How to Navigate Your Tax Portal

“Messages” – Click here for a list of notifications regarding your portal.

Home Dashboard

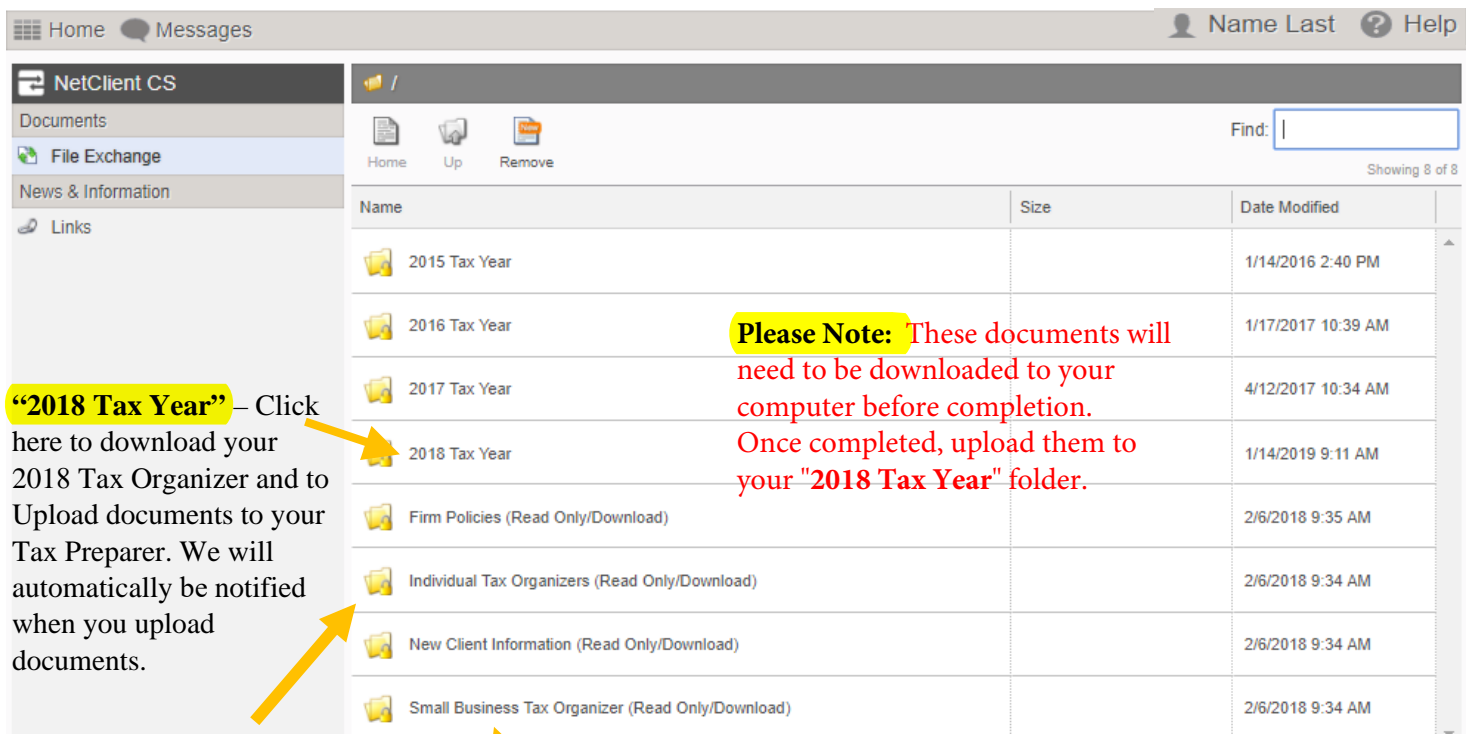


“File Exchange” – Click here to view and download:

- Organizer Materials
- Tax Returns and Tax Documents
- Firm Policies

“Your Name” – Click here to edit your account, change your password and set security questions.

File Exchange Dashboard



“2018 Tax Year” – Click here to download your 2018 Tax Organizer and to Upload documents to your Tax Preparer. We will automatically be notified when you upload documents.

Please Note: These documents will need to be downloaded to your computer before completion. Once completed, upload them to your “2018 Tax Year” folder.

“Individual Tax Organizers” – Click here to view and download Engagement Letters, Checklists, Worksheets, etc.

Please Note: If you have a small business, rental, estate/trust, C-Corp, S-Corp, or LLC, you will see those respective tax organizer folders here. Please view and download engagement letters, checklists, worksheets, etc. to help facilitate timely completion of your tax return.