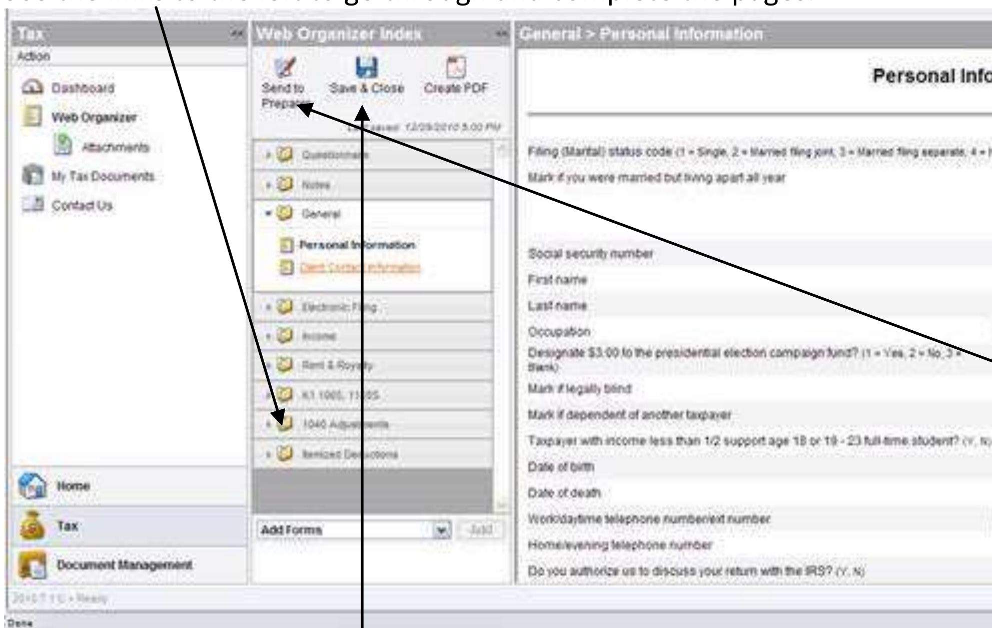
Here are detailed instructions (with screen shots) for using your client portal (including File Exchange and Organizer) once you have logged in.

ORGANIZER INSTRUCTIONS:

Click on the Web Organizer link to access your organizer.

Once you have clicked the Web Organizer link, you will come to the following screen (your web organizer).

Use the links to the left to go through and complete the pages.



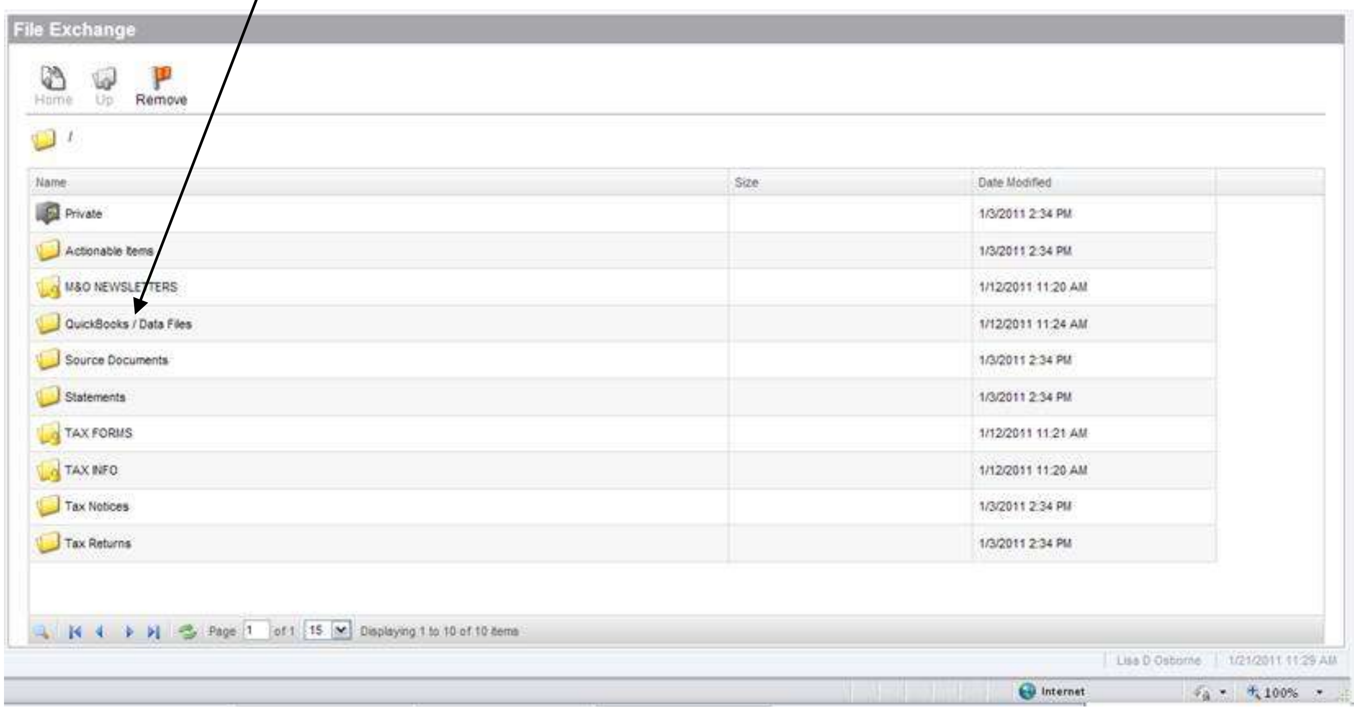
You can always click Save & Close if you need to leave and finish your organizer at a different time. Once you have completed your organizer, click Send to Preparer and we will be notified that you are finished.

FYI: Attachments to the organizer are only received by us when you have completed and sent your organizer. If you have files or documents to send to us without completing your organizer, use your File Exchange. Once you have sent us your organizer, you will no longer have access to it.

FILE EXCHANGE INSTRUCTIONS:

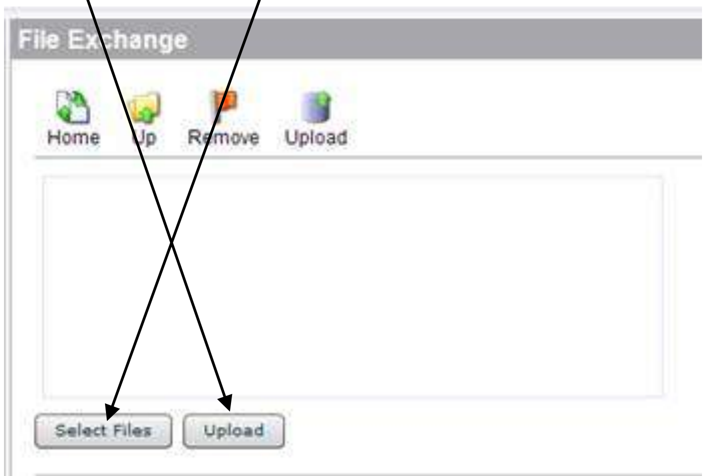
Click on File Exchange to send us documents.

Click on any of your folders to send us your documents or files.



Once you're in the selected Folder, click Upload.

Then click on the Select Files button to navigate through YOUR computer to find the file (or backup) that you want to send us. After file is in queue, hit the Upload button.



Once the file is uploaded, we will receive notification that there is a file available for retrieval.

As always, call or email us with any questions.