Portals – Online Client Access

FACT SHEET

Exceptionally secure, incredibly convenient

About Portals

Our client portals are your secure connection to our firm. Through our website, you simply login with your unique user ID and password to access your financial documents 24/7, when it's convenient for you.

We designed our portals with you in mind. We know how busy you are running your business and your personal life—leaving little time to call or visit our office to request or exchange documents. Through your private portal, all you have to do is login at any time and from anywhere you have an internet connection to access, review, print, or exchange documents.

Portals simplify the process of communicating with us. Take a moment to review the value our advanced online platform offers you.

We make it easy!

Access your financial documents within your private client portal at any time. We strive to make working with our firm as simple as possible.

The Value of Portals

Life is busy. Who has time to manually drop off documents or even call to request needed files anymore? The convenience of portals is everywhere—from online banking to shopping—and now through your accounting professional.

Consider the value of our advanced client portals:

Access your account 24/7.
You are not restricted by office hours. Enjoy online access anytime, anywhere.

Rely on advanced data security.
Portals are far more secure than sending documents back and forth via email.

Exchange docs and communicate with our firm in real time.
Via the portal, you can interact with firm staff immediately, and you are assured that you are always viewing current data.

Enjoy a paperless process.
Eliminate printing, faxing, and mailing documents. Portals allow you to work paper-free!

Steven M. Ellard, CPA

How to Use Your Secure Client Portal

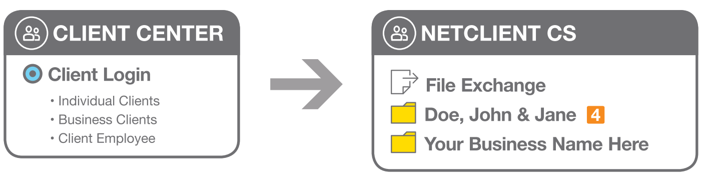
Follow these four simple steps to log in and access your tax information

☑ STEP 1—Receive an Email that Your Tax Return is Ready

You will receive an email from us when your tax return is ready for review. Attached will be your invoice, making it convenient for you to pay us (see Step 4).

☑ STEP 2—Log in to Your Portal

Visit stevenmellardcpa.com and log in through our Client Center with your username and password (make sure to select the Client Login radio button). Once logged in, select the appropriate client name, year, and "Tax Return" folder.



☑ STEP 3—Review, Sign, and Return

- Open the Tax Returns folder and review the US and State returns under the current year folder.
- If you approve, Print and sign Form 8879 (Federal Return) and the state signature form located in the Client Action Documents in the Client Action Required folder.
- Return the signed forms via your client portal, fax, mail, or drop them by our office (contact info below).

Note: If you have a balance due with your return or estimated payments due, you will need to stop by our office and pick them up.

If you prefer...

Stop by our office and we'll have your E-File forms ready for you to sign. If applicable, your balance due coupons and/or estimated tax payment coupons will be ready as well.

☑ STEP 4—Pay Your Invoice

Payment is due before we E-file your return. You may stop by, mail a check, or call with your credit card information.

PLEASE NOTE: In an effort to GO GREEN, we are trying to minimize printing a paper copy of your return unless requested. Your return will be available online when needed at yourfirm.com

Contact Us Today

For more information on our services, please contact our firm. We are happy to discuss how we can help you meet your financial goals. We look forward to hearing from you.

508.896.3377 | stevenmellardcpa.com

Steven M. Ellard, CPA