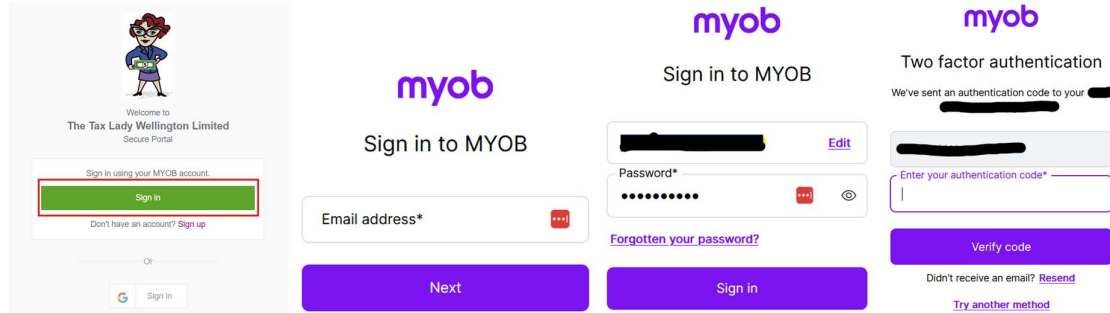


Portal Sign In Instructions

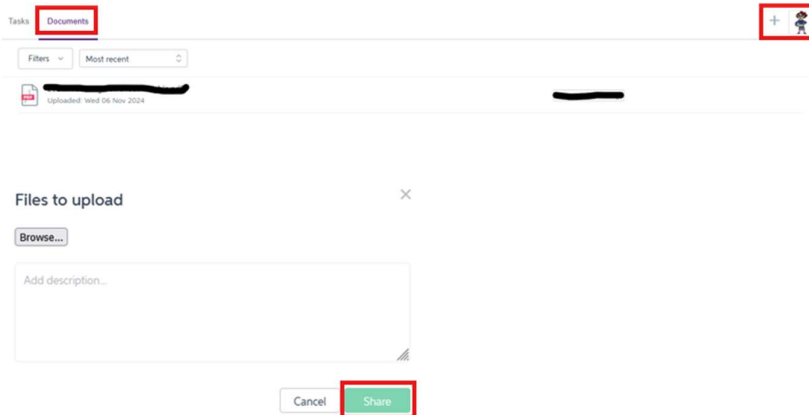
Our portal can be accessed through our website at any time, please go to Client Section, then select the drop down & Portal, alternatively, for ease of convenience here is a direct link - [Portal](#), this will take you to the sign on page.

Select Sign In>enter your email address>next>enter password>click sign in>enter authentication code from your chosen method>verify code.



Once you have access you can upload the checklist and your documentation to the portal.

When you sign into the portal there are two tabs – tasks & documents, select documents, then over to the right there is a + sign next to the tax lady image. Click on this and you can upload documents – please see images below. We get an automated response when you upload the documents, advising that they are there. Documents can be dragged and dropped, and you can add more than one document to the upload box before you push share.



Please find a link, below, to a short video on the how to use the portal and upload documents, please watch it's only a couple of minutes long.

[How to use Portal video](#)