

# Your Secure Client Portal

## How to Use SmartVault

We use SmartVault to securely share documents and give you access to your finalized tax returns. This guide helps you get started and make the most of your portal.



### How to Activate



Watch for an email titled "SmartVault activation request."

All SmartVault emails come from **notify@my.smartvault.com**  
Don't see it? Check your spam or junk folder and mark it "Not Spam."

### Getting Started

- 1 Check Your Email**  
Open the "SmartVault activation request" email and click the secure link.
- 2 Create Your Account**  
Follow the prompts to set up your account and choose a password.
- 3 Sign In**  
Use your email and password to sign in to SmartVault.

### Forgot Your Password?



- 1** Go to the SmartVault sign-in page.
- 2** Click "Forgot Password?"
- 3** Enter your email address.
- 4** Open the reset link we email you and follow the steps.

## Your SmartVault Folders

Your portal is organized into folders, each with permissions that keep your information secure.



### Client Tax Returns

Finalized Tax Returns

READ ONLY

Your finalized returns and signed documents, kept safe for your records.

#### You can

- ✓ View documents
- ✓ Download copies
- ✓ Print documents

#### You cannot

- ✗ Edit files
- ✗ Delete files
- ✗ Upload files

Finalized records stay secure and unchanged.



### Client Documents Upload

Working Folder

READ · UPLOAD · DELETE

Your working folder — the main place to send us documents.

#### You can

- ✓ Upload your files
- ✓ View your files
- ✓ Delete before we process

#### Previously Uploaded — Read Only

After we process your files, they move here — still viewable and downloadable.



### Best Practices for Uploading

- ✓ Upload clear, complete copies of each document.
- ✓ Combine multi-page documents into a single PDF.
- ✓ Label files clearly — e.g. "2025 W-2 ABC Company."
- ✓ Avoid password-protected files unless requested.
- ✓ Tell us once most of your documents are uploaded.



### Security & Confidentiality

- ✓ Never share your login credentials.
- ✓ Use a strong, unique password.
- ✓ Log out on shared or public computers.
- ✓ Contact our office right away with login issues.



Thank you for trusting us with your important financial documents. We're here to help keep your tax information secure and organized all year.