The CPAdvantage! LLC

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Secure Client Portal

Benefits For You

- **Private Members Only Content:** Currently 19 booklets have been uploaded or will soon be with information on Financial Planning, Long-Term Care, Living Debt Free, Reducing Taxes, etc. Also there is additional information on Business and Personal Tax Strategies, home-office documents and I plan on uploading detailed white-papers on the nitty-gritty of tax strategies.
- **If you have a scanner or PDF**, instead of emailing or faxing important documents to me, you can scan and upload in your Secure Vault and it will notify me that you have.
- **QuickSend:** If I need important tax papers from a 3rd Party such as your investment advisor, Attorney, title agency for closing statements, etc, they can use Quicksend to securely load data into my Vault. This way it will won't be emailed or faxed to wrong person, and then I can transfer into your vault for safekeeping.
- **Access to your** Tax Returns, W-2s and other important information 24 hours a day. Print out documents in PDF.
- Ability to arrange separate folders, such as "2010 Tax Info" or "Wills, Trusts, Living Will" or any folder title you want to secure your information.
- Scan and upload your Wills, Trusts, passports and important information.
- Scan and upload important financial inventory information (We can provide data sheets for this purpose)
- Folders for household inventory, insurance papers, or medical prescriptions you are taking.
- Information available and in one place so if you where to pass away or have an accident your distressed children would have the comfort of knowing they could call our office and we could provide all the important documents you wanted them to have to smoothly transition. PS: Please let your loved ones know you have the information in a secure vault with our office.
- If you do not have a scanner we can scan and manage your important documentation for you.
- We have inventory and data sheets available to help you record important information that would be critical if you were to be an emergency situation, hospitalized or pass away.

How to Get Started:

Please go to the **"Resources"** tab on the menu bar located at *www.TaxFreeTaxCoach.com*. From there click on "Client Portal" and at the bottom it will say:
To start using the client portal please log in above or "**register here"**.

The registration page is pretty basic and asks for name, email address and password. Your email address will be your username. Once this is done it will send me a notification and I will approve you to have access and then email your acceptance notification back to you.

After you receive acceptance and you log in to the client portal you will have access to **"Financial Calculators"** and the **"Secure File Exchange**". Once in the Secure File Exchange you will have a "My Documents" folder and a "Public Folder". The **My Documents** is your **Secure Private LockBox** where you can upload documents using the "Upload" button in upper left. Only you and I can view these documents. I am the only one who can upload documents to the Public Folder. This is where you will find member only content such as Booklets, articles and other Tax/Financial related information.