

Secure File Pro

Client Log in Instructions

1. You will receive an email advising that an account has been created.
2. The email will include your username and a link to access the portal. The link will expire in 48 hours.
3. When the next window appears once you have clicked on the link to access the portal, please enter the last four digits of the SSN or EIN issued to you.
4. Create a password for your account. The password must contain an upper-case letter, a lower-case letter, a number and a special character.

To Download documents from preparer:

1. When the home page displays, notice the My Folder menu to the left.
2. Click Documents from Preparer.
3. In the right window, your documents should appear. Click the Download link for a document.
4. Select to open or save the file.
5. If you select Save, follow the normal procedure you use when saving a file to your computer.

To Submit a document to your preparer:

1. Click the Documents to Preparer link under the My Folder section.
2. In the right window, click the Upload link.
3. Click the Select button to search for the file you would like to upload.
4. The file should display under the button. Click the Upload button.
5. The file will display in the right window. You have the opportunity at this time to rename or delete the file if necessary.
6. Your preparer will be notified that a file is ready for downloading from you.

If you have any questions, please contact our office.