

Portals - Online Client Access

FACT SHEET

In the age of apps and mobile devices, we're with you everywhere.

Our Online Client Center Is Yours To-Go

The world doesn't stand still for anyone—and that's why we've been working hard to assure that you have secure access to your important files and documents whenever and wherever you want them. We're proud to offer you secure online client access from your desktop, laptop or mobile devices. Whatever device you use, wherever your online world extends, all it takes is a login to get down to business:

Access your account 24/7.

You are not restricted by office hours. Enjoy online access anytime, anywhere.

Rely on advanced data security.

Our online Client Center is far more secure than sending documents as email attachments.

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. Online access allows you to work paper-free!

We make it easy!

With online client access, our firm is always open, and getting to your important documents and business information is secure, convenient and simple.




Get Started Today—Here's How...

Follow these simple steps to access and manage your financial documents:

✓ **Connect** with our office to establish your online access (your Client Center username and password).

✓ **On your mobile devices**, access the iOS App Store  or Android Market 

✓ **Search and install** the free NetClient CS app 

✓ **Login** using your mobile apps or through our website if you're using a desktop or laptop computer.

✓ **Immediately access** all of your important financial documents:

- Tax returns
- Tax source documents
- Payroll checks and W-2s
- Financial statements and reports
- Other important financial information

✓ **Securely upload** your other important financial documents:

- Life insurance policies
- Disability policies
- Wills and trust
- Real estate appraisals
- Other important documents



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