

WELCOME TO THE CLIENT PORTAL

Welcome to your personal client portal where you may upload your tax documents and download your tax returns securely with just a click.

REGISTER/LOGIN AT WWW.SLISSNERCPA.COM

On our homepage, click the “client portal” button at the top right.

Select “register here” and follow the prompts.

Make sure to save your password as this will be your permanent account to use every year.

Once we receive and approve your registration request, you will get an email notification.

Log in to the portal anytime from any of your electronic devices.

ORGANIZE YOUR CLIENT FILE VAULT

Create folders in your file vault by clicking the “new folder” button in the panel on the left.

Organize your client portal for easy accessibility to let us exchange documents quickly and securely.

Use this standard folder structure:

- Create a separate folder for each tax year
- Within each tax year folder, separate personal (1040) from business documents. Documents include (but are not limited to):
 - W-2s
 - 1099 forms
 - Schedule K-1s
 - Dependents’ tax documents
 - Rental properties and related documents
 - New clients: include a subfolder with your prior year tax return

Upload files to the appropriate folders through the upload panel or simply by dragging and dropping files in the open folder window.

If you update a document, please delete prior versions of that document to avoid confusion.

FILE FORMATS

Acceptable digital file formats are PDF, Word and Excel only.

We do not accept files in the following formats: .gif, .jpeg, .png or .tiff.

CONTACT US

Questions or problems? Call us at (973) 917-4080 or email us at info@slnjcpa.com.

Please let us know when your tax information upload is complete and ready for us to start work on your taxes.

STEVEN LISSNER & COMPANY LLC CERTIFIED PUBLIC ACCOUNTANTS

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