CLIENT PORTAL GUIDE

Your folder on Steven Lissner & Company's client portal is a secure and convenient way to share files with us. Upload tax documents and download tax returns with a click.

Here are five simple steps to get set up and stay organized.

1. Register/login at www.slissnercpa.com

- ☐ Click the **Client Portal** button at the top right of our homepage.
- ☐ Select **register here** and follow the prompts.
- ☐ Save your password—your folder does not expire.
- ☐ You will get an email notification when your registration is accepted and your folder is functional.

2. Confirm before uploading

- ☐ Check that you have received and included **all documents necessary** to complete your return.
- ☐ Save all your files in **Word, Excel** or **PDF format only** (please combine multiple documents in one PDF).
- ☐ Transfer all files to your folder **in one single upload** (do not transmit in multiple uploads).

3. Contact us after uploading

- ☐ Call **(973) 917-4080** or email **info@slnjcpa.com** to let us know when your upload is done and you are ready to be added to the schedule for tax preparation.
- ☐ Please note: Work on your tax return cannot begin until you alert us that we have **all necessary documents**.
- ☐ Questions? Reach out to us seven days a week during tax season.

4. Organize your folder

- ☐ Create subfolders by clicking the **New Folder** button in the panel on the left, and use a new subfolder for each tax year.
- ☐ If you submit information for both individual and business (or other) tax returns OR on behalf of another individual (i.e., a parent or child filing Form 1040), please save documents separately and indicate accordingly.
- ☐ If appropriate, include a summary document to highlight any important notes for your accountant.
- ☐ **New clients**: Please upload your last completed tax return(s).

5. Portal maintenance reminder

- ☐ Our client portal is for **temporary file storage only**—it is not a permanent storage vault.
- ☐ As part of ongoing portal maintenance, **we will remove files related to tax returns 3–6 months after completion**.
- ☐ Only documents relating to tax work currently in progress should remain in your folder.
- ☐ Remember to download all documents needed for your own recordkeeping.
- ☐ We recommend you save the past **five years** of tax returns and related documents.

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CERTIFIED PUBLIC ACCOUNTANTS

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