

## Portals - Online Client Access

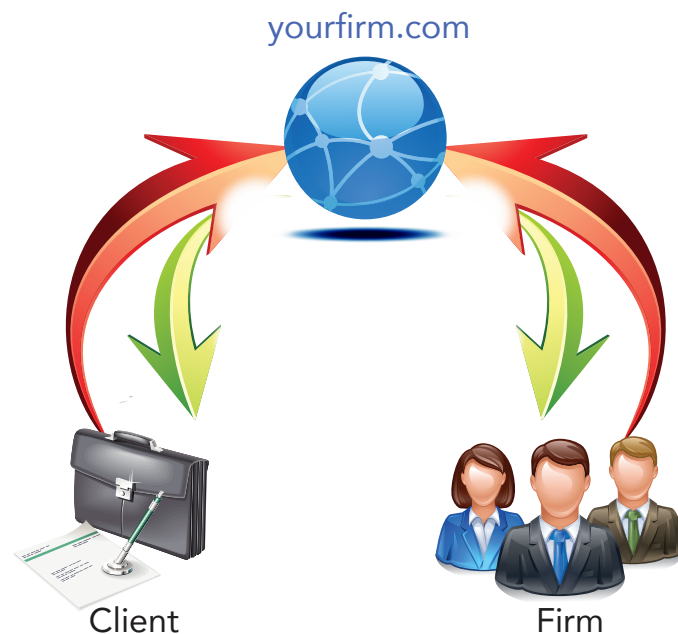
Exceptionally secure, incredibly convenient • Access your financial documents online 24/7 when YOU need them

### About Portals

Our client portals are your secure connection to our firm. Through our website, you simply login with your unique user ID and password to access your financial documents 24/7, when it's convenient for you.

We designed our portals with you in mind. We know how busy you are running your business and your personal life—leaving little time to call or visit our office to request or exchange documents. Through your private portal, all you have to do is login at any time and from anywhere you have an internet connection to access, review, print, or exchange documents.

Portals simplify the process of communicating with us. Take a moment to review the value our advanced online platform offers you.



### We Make It Easy!

- Access your financial documents within your private client portal at any time.
- We strive to make working with our firm as simple as possible.

## The Value of Portals

Life is busy. Who has time to manually drop off documents or even call to request needed files anymore? The convenience of portals is everywhere—from online banking to shopping—and now through your accounting professional. Consider the value of our advanced client portals:

- Access your account 24/7. You are not restricted by office hours. Enjoy online access anytime, anywhere.
- Rely on advanced data security. Portals are far more secure than sending documents back and forth via email.
- 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. Portals allow you to work paper-free!

# How to Use Your Secure Client Portal

Follow these simple steps to access and exchange your financial documents

We were among the first CPA firms in the country to offer our clients the advantages of online access to their information, via our client portals. There are several different methods our clients might use to access their information, to share files with us, to send us payroll information, etc. Besides helping organize the information and providing 24/7/365 access from anywhere in the world, data is automatically encrypted so it is safe as it travels via the Internet.

To access your portal:

- From a computer:
  - o Access our web site, [www.tzinberg.com](http://www.tzinberg.com)
  - o Log in via the Client Center
- From an iPhone or iPad:
  - o In the App Store, search for "NetClient CS"
  - o Or click here:



- o Install NetClient CS (it's free)

- From an Android mobile device:
  - o Search Google Play for "NetClient CS"
  - o Or click here:



- o Install NetClient CS (it's free)

Your Username is generally your email address. Your password is generally the 1st 4 letters of your last name, plus the last 4 digits of your Social Security Number, plus "\$", e.g. Smit1234\$ (CASE SENSITIVE). If you forget your password, click [Forgot Password?](#) You can change your password at any time, just click on the My Account button.

## INCOME TAX RETURNS AND OTHER DOCUMENTS

Always available in Document Presentation. Documents can be saved to a local drive, or printed.

## EMPLOYEE ACCESS

When we prepare payrolls for clients, we can provide 24/7 secure access for employees to their payroll information. The cost is minimal: 10 or fewer employees is only \$4 per week. Each payroll period, Check Stub and Earnings History information is available. W-2s are also online.

## FILE EXCHANGE

If we have provided you with access to File Exchange, it allows us to share files. Any files on File Exchange are automatically deleted after 14 days. Files can be up to 2 gigabytes. Once the file has successfully uploaded, remember to Sign Out. We receive an automatic notification whenever a client uploads files for us.

## IS NETCLIENT SECURE?

Your data is in the most secure location available - a Class IV, IBM-certified data center. The data center takes every precaution to guarantee the safety and integrity of your data.

As always, should you have any questions, need further discussion, or we can be of any assistance in any way, please contact us.