

Welcome to

I have launched a new secure client portal called TaxDome. You will receive an email from me inviting you to create a login for TaxDome. I encourage you to also download the TaxDome app on your phone or tablet for additional functionality.

TaxDome allows you to:

- View and electronically sign my Engagement Letter (in TaxDome, it's under "Contracts").
- Respond to an Organizer (tax questionnaire) and provide the information needed to prepare your tax returns.
- Attach Documents to the Organizer; you can also snap pictures of Documents via the mobile app and easily upload them.
- Communicate with me via secure Message and attach documents to a Message.
- Review and approve your tax returns.
- E-sign your tax returns.
- View and pay my tax preparation services Bill.
- Access historical tax Documents and current year tax returns.

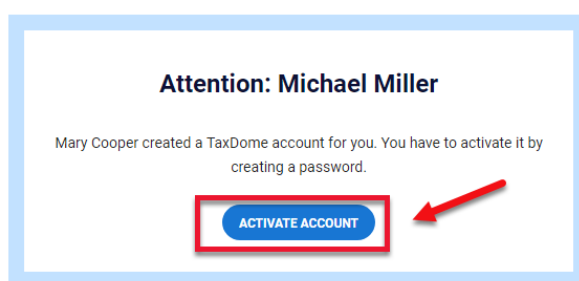
TaxDome uses smart notifications, to-dos, and reminders, so you'll always know what items I need and how your tax return is progressing. Plus, the client portal is mobile friendly, so you can access it anytime, anywhere!

LET'S GET STARTED

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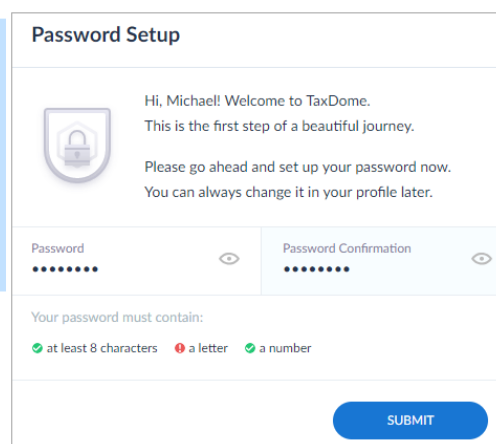
A Quick and Easy Activation Process

Open the invitation email and click on the **ACTIVATE ACCOUNT** link. Then create your password. Enter it twice to confirm, then click **SUBMIT**.



Have any questions or feedback? Help is [one click away](#) or you can reply to this email.

That's it! Now you can use your portal. To return to it in the future, you'll just need to sign in with your email and password.



Password Setup

Hi, Michael! Welcome to TaxDome.
This is the first step of a beautiful journey.

Please go ahead and set up your password now.
You can always change it in your profile later.

Password: Password Confirmation:

Your password must contain:

- ✔ at least 8 characters
- ✘ a letter
- ✔ a number

SUBMIT

TIP - When you download the mobile app from the Apple or Google app stores, you may need my TaxDome URL: www.schultztaxservices.taxdome.com



Welcome to

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Check out Your To-Dos

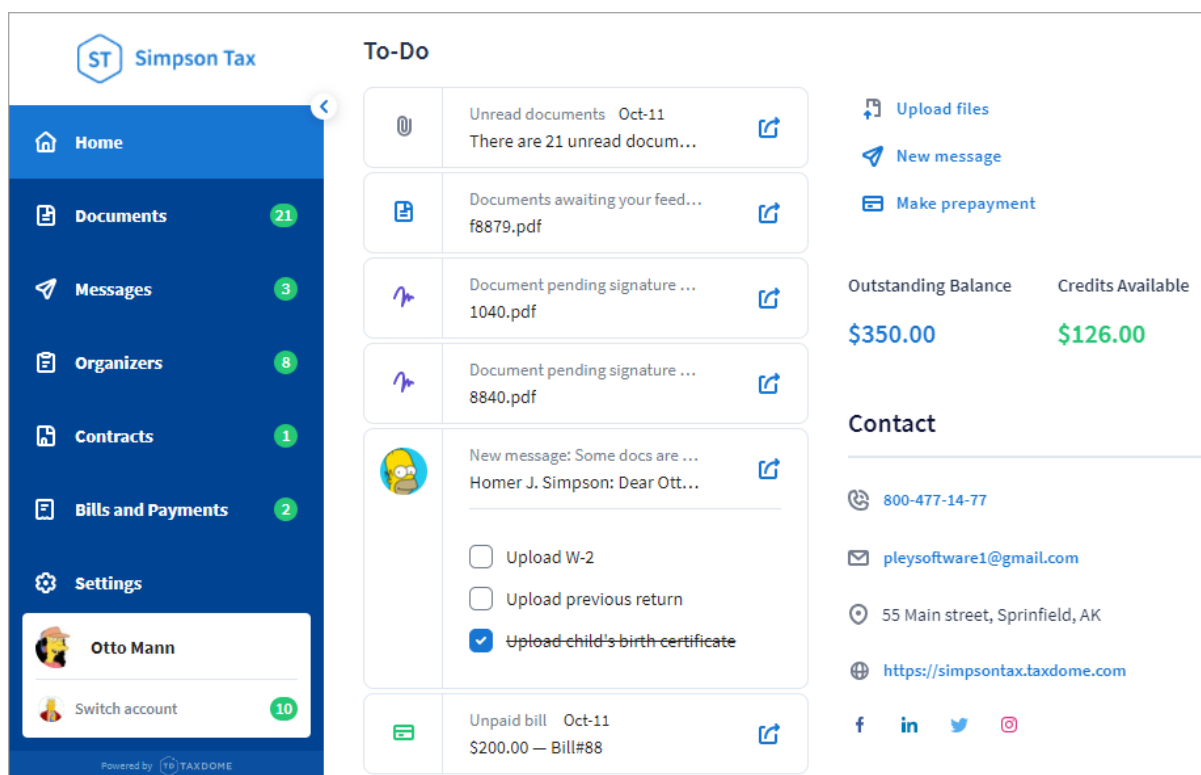
The first page you see is your dashboard with notifications for new Messages, pending Organizers, and unread Documents. You'll also find my contact information there.

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Explore the Main Menu in the Left Sidebar

From the sidebar, you can easily navigate to:

- Documents - Upload your documents, e-sign, and download what I've prepared for you.
- Messages - Ask me questions or respond to requests.
- Organizers - Complete questionnaires needed to prepare your documents.
- Contracts - E-sign engagement letters that define the scope of the work.
- Bills and Payments – Pay your invoice and review your payments.
- Settings – Manage and add additional users to your account, if needed.



NOTE: If you have an individual tax return (Form 1040) and a business tax return (Forms 1120-S, 1065, or 1120), then you will have two TaxDome client pages. However, you can use the same log-in credentials and easily toggle between them within TaxDome.



Here are a few short helpful videos:

[How to Upload Docs](#)

[How to Use Mobile App to Upload Docs](#)



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