

Welcome to

TaxDome is my secure client portal. You will receive an email from me inviting you to create a login for TaxDome. The application uses smart notifications, to-dos, and reminders, so you'll always know what items I need and how your tax return is progressing.

TaxDome allows you to:

- View and electronically sign Engagement Letters.
- Respond to a Tax Organizer and provide the information needed to prepare your tax returns.
- Attach Documents to the Tax Organizer; you can also snap pictures of Documents via the mobile app and easily upload them.
- Communicate with me via secure Chat and attach documents to a chat message.
- Review and approve your tax returns.
- E-sign your tax returns.
- View and pay Invoices.
- Access tax returns and other Documents.

I encourage you to also download the TaxDome app on your phone or tablet.

- [Get it on Google Play](#)
- [Download on the Apple Store](#)

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

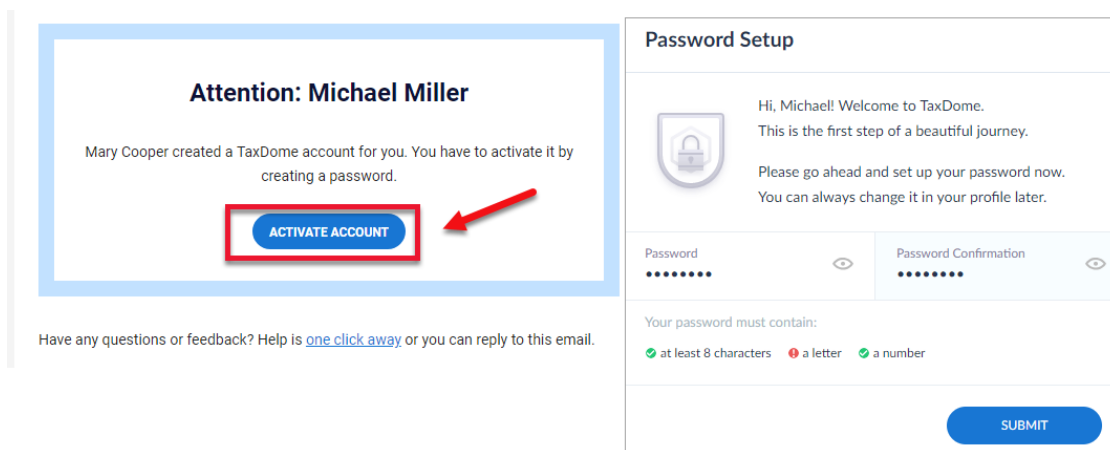
www.schultztaxservices.taxdome.com

LET'S GET STARTED

1

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.



Attention: Michael Miller

Mary Cooper created a TaxDome account for you. You have to activate it by creating a password.

[ACTIVATE ACCOUNT](#)

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

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](#)

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



Welcome to

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Check out Your To-Dos

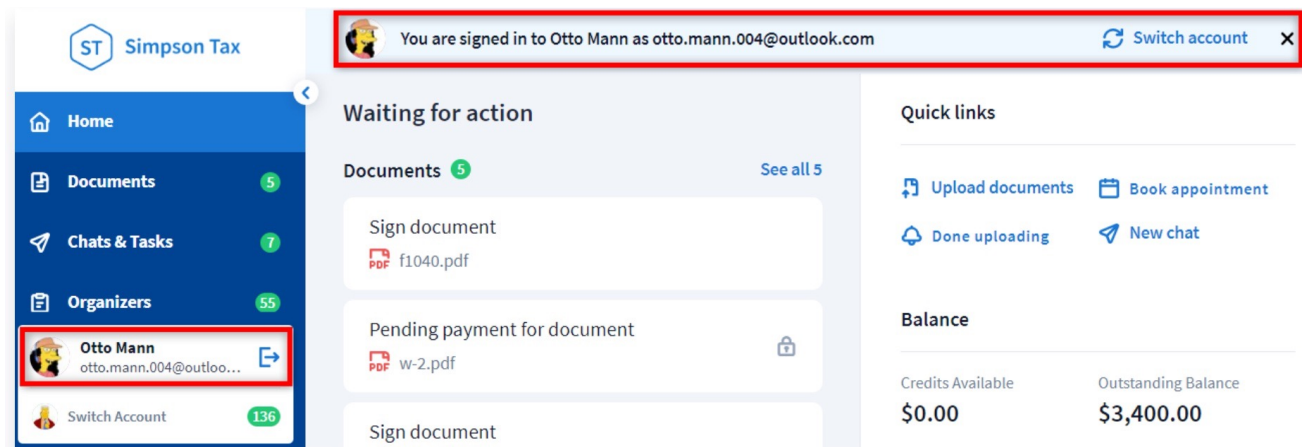
The first page you see is your dashboard with notifications for new Chats, pending Organizers, and unread Documents. You'll also find my contact information there.

3

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.
- Chats & Tasks - Ask me questions or respond to requests.
- Organizers - Complete questionnaires needed to prepare your documents.
- Proposals & Engagement Letters (EL) - E-sign engagement letters that define the scope of the work.
- Billing – Pay your invoice and review your payments.
- Settings – Manage access to your account.



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.

Need help?

- [Visit the TaxDome client help pages.](#)
- [View the TaxDome client videos on YouTube.](#)

