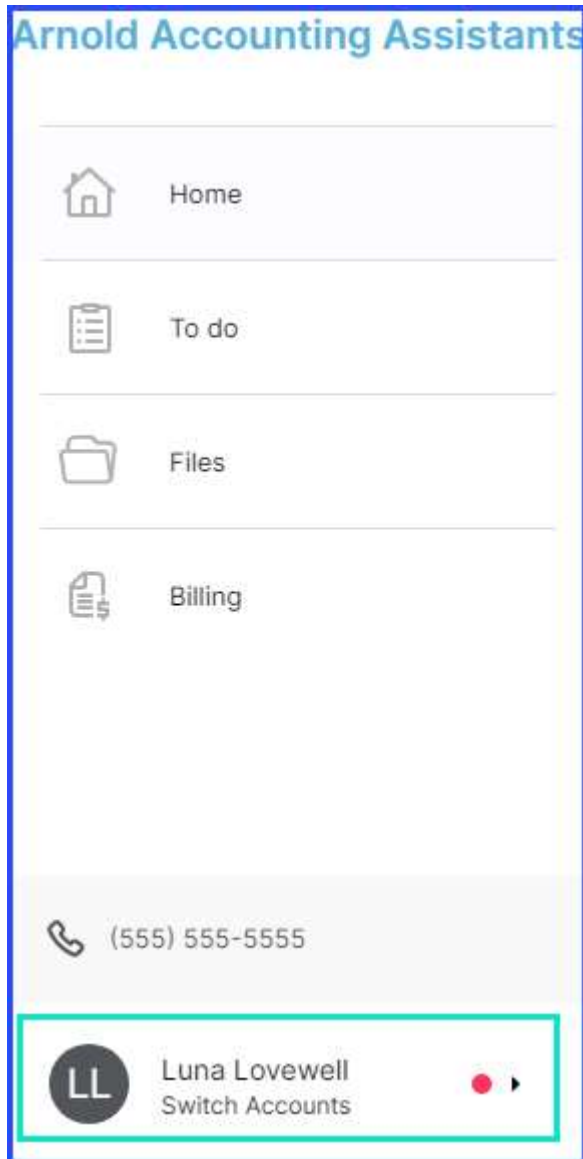


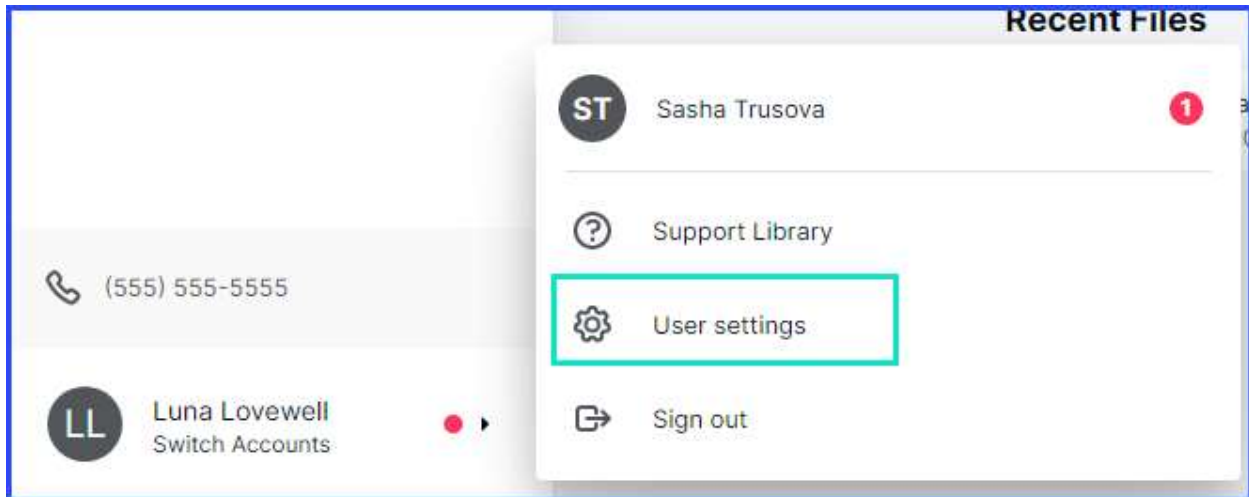
Client Portal Settings

You can update your contact information, time zone, and password in your Client Portal account settings. To get started, log in to your Client Portal account.

1. Click on your *Profile name* in the bottom left.



2. Click *User settings* on the pop-out menu.



3. Update the information in any of the provided fields.

Available fields to change include **First Name, Last Name, Email, Phone and Ext., Time Zone, and Password.**

Please Note: The name displayed on your profile must also be changed by your accountant. If you need to have your name changed in the Client Portal, please reach out to your accountant.

4. Click *Save Changes*.

A screenshot of the 'User Settings' form. The form contains the following fields: 'First name*' with the value 'Luna', 'Last name*' with the value 'Lovewell', 'Email*' with the value 'stageluna@canopytax.com', 'Phone' and 'Ext.' fields, and a 'Time zone' dropdown menu set to 'America/Denver (Mountain Time)'. Below these fields is a 'Reset password' button. At the bottom, there is a section for 'Two Factor Authentication' which is checked, with a link to 'Learn more'. At the very bottom, there are two buttons: 'Save changes' (highlighted with a red rectangular box) and 'Undo'.

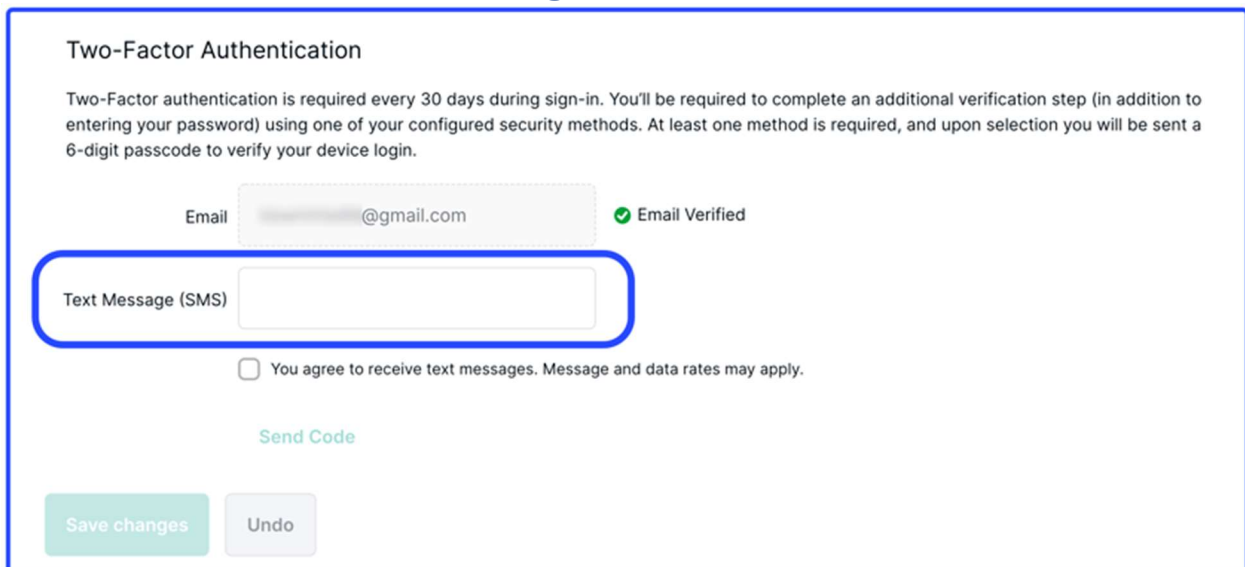
Two-Factor Authentication Settings

This section details how to enter and manage security methods for two-factor authentication (2FA).

When you sign in to the Client Portal, you'll be asked to enter a six-digit code to authenticate your account. By default, the code is sent to your account email. After you enter the code, you'll access the Client Portal.

The steps below guide you on how to enable text messages (SMS) as another method to receive codes.

1. To receive codes on your mobile device, enter a phone number in the Text Message (SMS) field.



Two-Factor Authentication

Two-Factor authentication is required every 30 days during sign-in. You'll be required to complete an additional verification step (in addition to entering your password) using one of your configured security methods. At least one method is required, and upon selection you will be sent a 6-digit passcode to verify your device login.

Email ✔ Email Verified

Text Message (SMS)

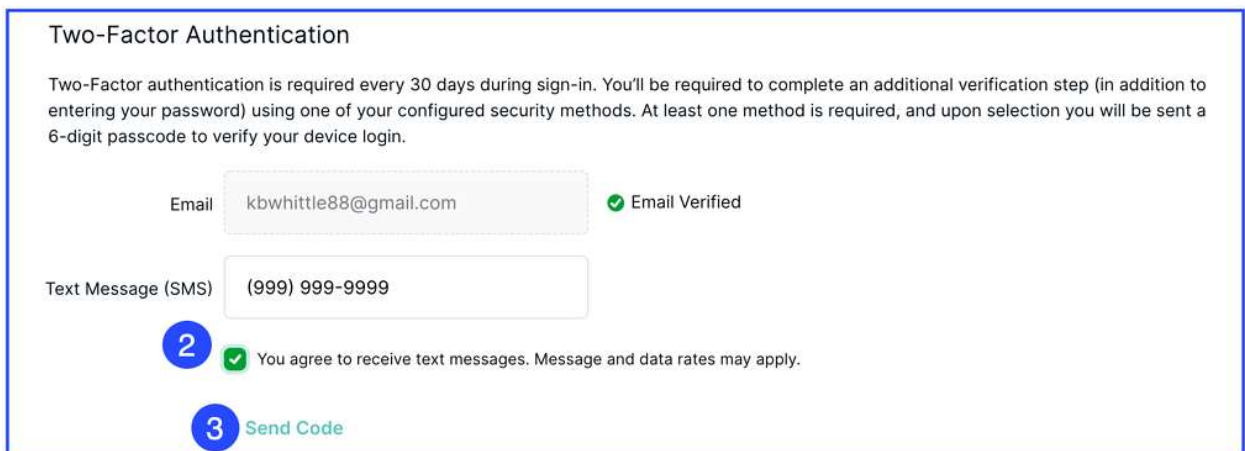
You agree to receive text messages. Message and data rates may apply.

[Send Code](#)

[Save changes](#) [Undo](#)

2. Check the box to agree to receive text messages.

3. Press Send Code to receive a verification code.



Two-Factor Authentication

Two-Factor authentication is required every 30 days during sign-in. You'll be required to complete an additional verification step (in addition to entering your password) using one of your configured security methods. At least one method is required, and upon selection you will be sent a 6-digit passcode to verify your device login.

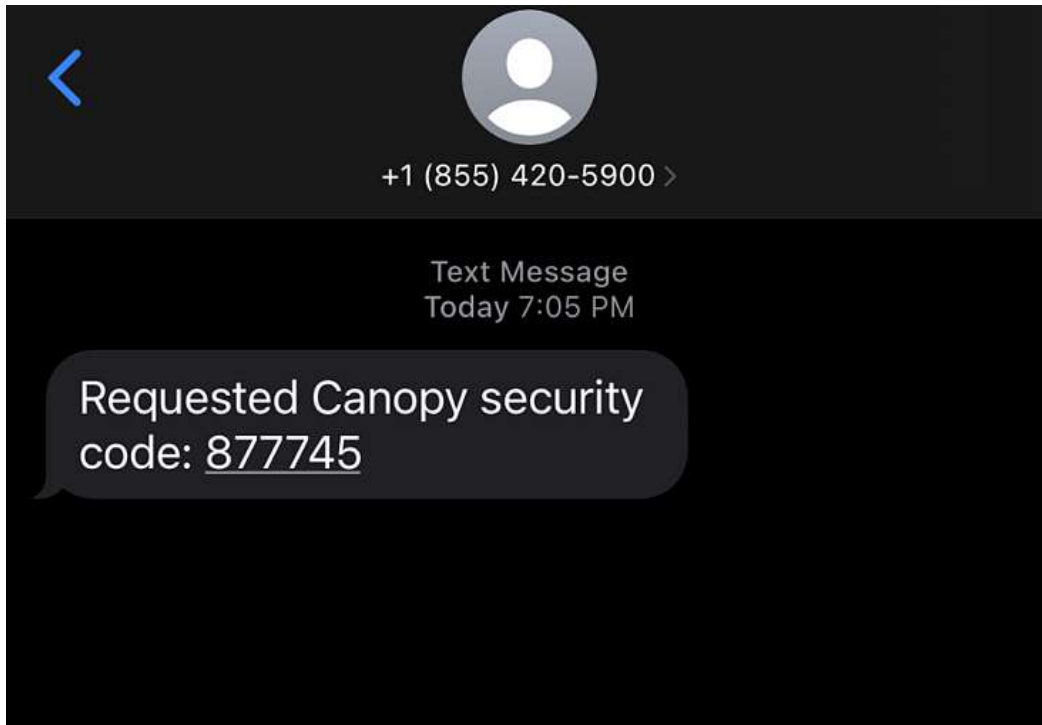
Email ✔ Email Verified

Text Message (SMS)

2 You agree to receive text messages. Message and data rates may apply.

3 [Send Code](#)

The requested code looks like this:



4. Enter the code in the Client Portal and press Verify SMS.

2-Step Verification

2-step verification is required every 30 days during sign-in. You'll be required to complete an additional verification step (in addition to entering your password) using one of your configured security methods. At least one method is required, and upon selection you will be sent a 6-digit passcode to verify your device login.

Email ✔ Email verified

Text Message (SMS)

You agree to receive text messages. Message and data rates may apply.

Code sent to your device

Enter the code [Verify SMS](#)

[Didn't get it? Resend](#)

Once verified, you can use your email or phone number to receive codes to authenticate access to your client portal.

2-Step Verification

2-step verification is required every 30 days during sign-in. You'll be required to complete an additional verification step (in addition to entering your password) using one of your configured security methods. At least one method is required, and upon selection you will be sent a 6-digit passcode to verify your device login.

Email ✔ Email Verified

Text Message (SMS) ✔ SMS Verified

You agree to receive text messages. Message and data rates may apply.

[Remove number](#)