Log in to the Client Portal Mobile App

In order to begin using the Client Portal, you will need to download the Client Portal app. Search for "Canopy Client Portal" in the <u>Apple App Store</u> or <u>Google</u> <u>Play Store</u>.

our accountant will send you an invite via email to join the Client Portal. Upon receiving this email, you will need to create a Canopy account. To get started, click **Create account** in the email invitation from your accountant.

1. Fill out the required information:

Please create your account. Account Information* Jane Jane MI Smith Email address* emily.gualtier+client@canopytax.com Create password* Image: Confirm password could be cracked in about 6 months Confirm password* Image: Confirm password*	Welcome	e to Canopy.
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2. Click the checkbox to agree to the *Terms of Service* and *Privacy Policy*.

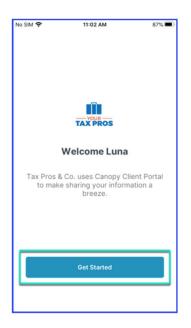
3. Navigate to the Client Portal app on your device and enter your login credentials.

4. Tap Log in.



Navigating the Client Portal First Login Experience

Upon logging into the Client Portal for the first time, you will need to walk through a few steps to set basic preferences in the app. To begin, click **Get Started**.



1. Specify whether or not you want to receive notifications from the Client Portal app.

