

**4 ways to get us your documents:** (1) Secure Portal Service (2) Email to TaxPro.Steve@gmail.com (3) Drop them off at my physical secure lock-box (4) Schedule an appointment to meet face-to-face.

## How to use the Secure Portal Service:

- 1) Click on the following link. <https://taxprosteve.securefilepro.com/portal/#/login>
- 2) Under Guest Exchange, **click Upload**. (Do not use Client Sign In area)

The screenshot shows two side-by-side panels. The left panel, titled "Sign In", is crossed out with a large red 'X'. It contains a "Username" input field, a "Password" input field, a blue "Sign in" button, a link for "Forgot Username or Password", and a link for "Employee Sign In". The right panel, titled "Guest Exchange", features a document icon and the text "Don't have an account? Securely upload or download files from here." Below this text are two buttons: "Upload Files" and "Download Files". The "Upload Files" button is circled in red with a checkmark to its right.

- 3) Fill out **1, 2, 3** (drop-down), and **4**.

### Mid-America Tax & Steve Kenniston

The screenshot shows a form for sending documents to Mid-America Tax & Steve Kenniston. The form is divided into two main sections. The left section, titled "Information to Send to Mid-America Tax & Steve Kenniston", contains four fields: "Your Name\*" (labeled 1), "Your Email\*" (labeled 2), "Select Recipient\*" (a dropdown menu with "Stephen Kenniston" selected, labeled 3), and "Message to Mid-America Tax & St..." (labeled 4). The right section, titled "Select File(s) then click Upload", contains a "Select" button (labeled 5) and an "Upload" button (labeled 6). A "Cancel" button is also visible below the "Upload" button.

**5** Select files to upload (can be PDF, Word.doc, Excel, or Jpeg files)

**6** Click to upload. Your files will be sent to your taxman Steve