



LL Financial
SERVICES



CLIENT PORTAL TUTORIAL

in partnership with

SmartVault

When you click the “Activation Link” in the email, the below screen will pop up. Your First name, Last name, and email address will be pre-populated. Add your phone number, chose a password and click “Create My User” – this will take you directly to your portal



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 The vault La Fleur, Oscar and Lindsay has been shared with you.

Please complete the form below to access it.

Time Zone:

First name:

Last name:

Email address:

Phone number:

Password:

Minimum length is 12 characters; must include at least one of each of the following: upper case letter, lower case letter, number, punctuation

Password Strength:

Confirm password:

I agree to SmartVault's [Terms of Service](#)

1. Make sure you are on the Home screen – click here

Home

My Info

Help

Sign Out

Your name and email

Hide Sidebar

Account Tasks

[Refresh](#)

Help Resources

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Name ▲	Actions
 Your name	
 Public Documents	

2. Click the folder with your name

Contents for Vault Berman, Rebecca

Page: 1 of 1 Go Page size: 3 Change Item 1 to 3 of 3

Name	Size	Type	Date Modified	Actions
Scanned Documents		Folder	11/16/2017	 
TY16		Folder	11/16/2017	 
TY17		Folder	11/16/2017	 

Page: 1 of 1 Go Page size: 3 Change Item 1 to 3 of 3

My Notification Settings for Vault Your name

- Email me when a new file is uploaded to the folder.
- Email me when a file in the folder is viewed or downloaded.

3. Click the folder named TY17 to access your Tax Organizer

Your name TY17

Your name and email

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FOLDER TASKS

- [Refresh](#)
- [Send Link to Folder](#)
- [Get Link to Folder](#)
- [Copy Folder](#)

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Contents for Folder TY17

Name	Size	Type	Date Modified	Actions
Client Source Documents		Folder	11/16/2017	
Client Tax Returns		Folder	11/16/2017	
Tax Organizer		Folder	11/16/2017	

My Notification Settings for Folder TY17

- Email me when a new file is uploaded to the folder.
- Email me when a file in the folder is viewed or downloaded.

Click on this folder. This will bring you to the next screen containing your Tax Organizer pdf.

Your name and email

Hide Sidebar

Folder Tasks

- Refresh
- Send Link to Folder
- Get Link to Folder
- Copy Folder

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- FreshBooks
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- Mobile
- QuickBooks Online
- QuickBooks for Microsoft Windows
- Xero

name TY17 Tax Organizer

Contents for Folder Tax Organizer

Name	Size	Type	Date Modified	Actions
 2017 Individual Client name Organizer.pdf	2,326 KB	pdf	11/16/2017	   

My Notification Settings for Folder Tax Organizer

- Email me when a new file is uploaded to the folder.
- Email me when a file in the folder is viewed or downloaded.

Click the download icon.
This will open up a pdf of
the Tax Organizer which you
can print.