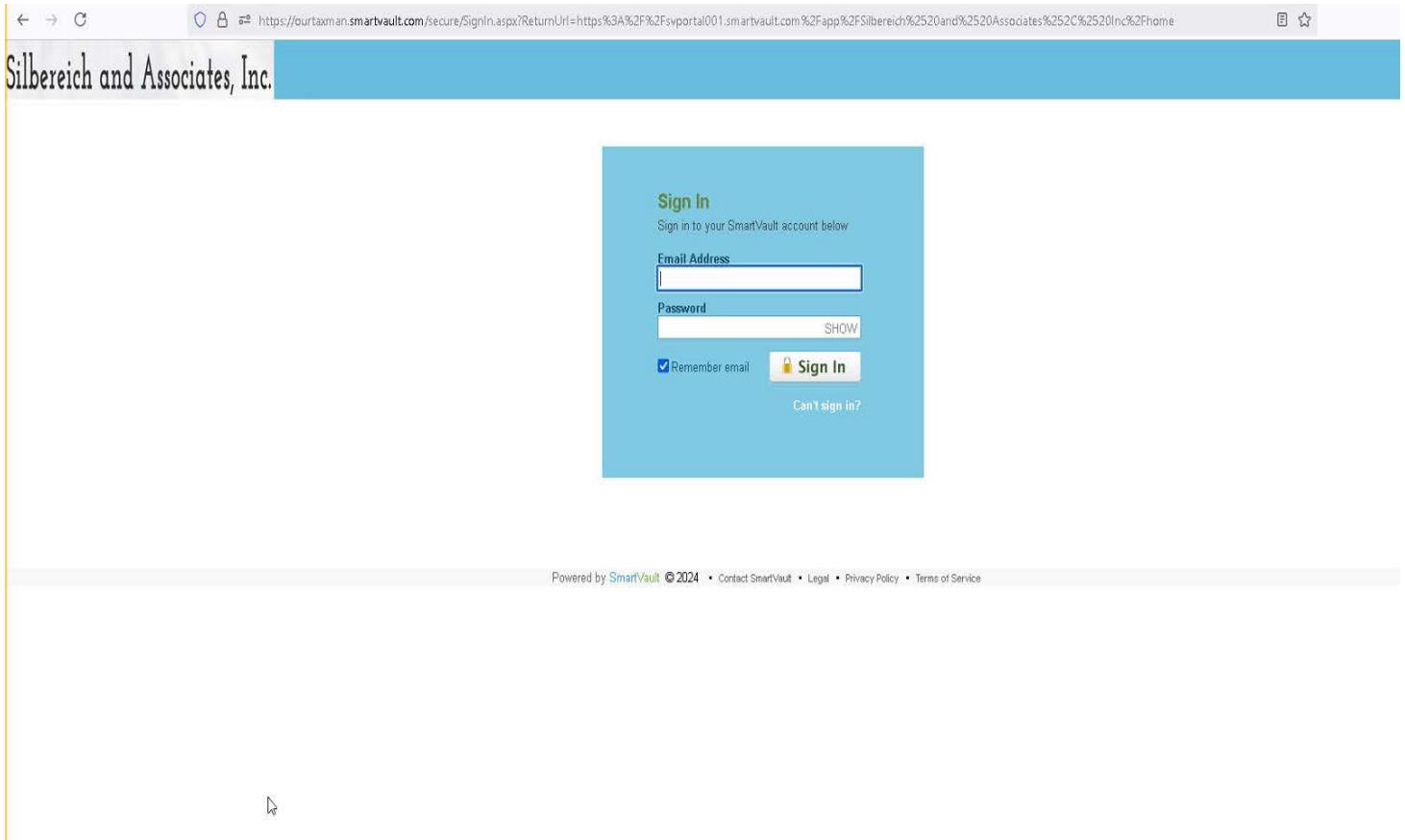


Silbereich and Associates, Inc.

Step-by-step Guide Through the SmartVault Portal

This is a guide for all new users and current users of Silbereich and Associates' SmartVault. Current users should follow the normal login steps to access the portal. New users should have already received an invite link via email and should just click that link to complete the setup.

1. Go to <https://ourtaxman.smartvault.com>



2. Login to your account using your email and password. Please note that your email address must be the one you provided to Silbereich and Associates. The password was or needs to be set by you.

Once you clicked the signed in button, for security reason it will send a verification code to your email. Please enter this code in the verification field on the portal.

SmartVault

We've sent a verification code to your email address:
s*****h@gmail.com
Check your email and enter the code.
The code will expire in 10 minutes.

Verify Identity
Enter code below

Verification Code
Enter code

Submit

Resend Verification Code

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3. If you forgot your password, please reset it by clicking on the "Can't sign in?" link.

Silbereich and Associates, Inc.

Sign In
Sign in to your SmartVault account below

Email Address

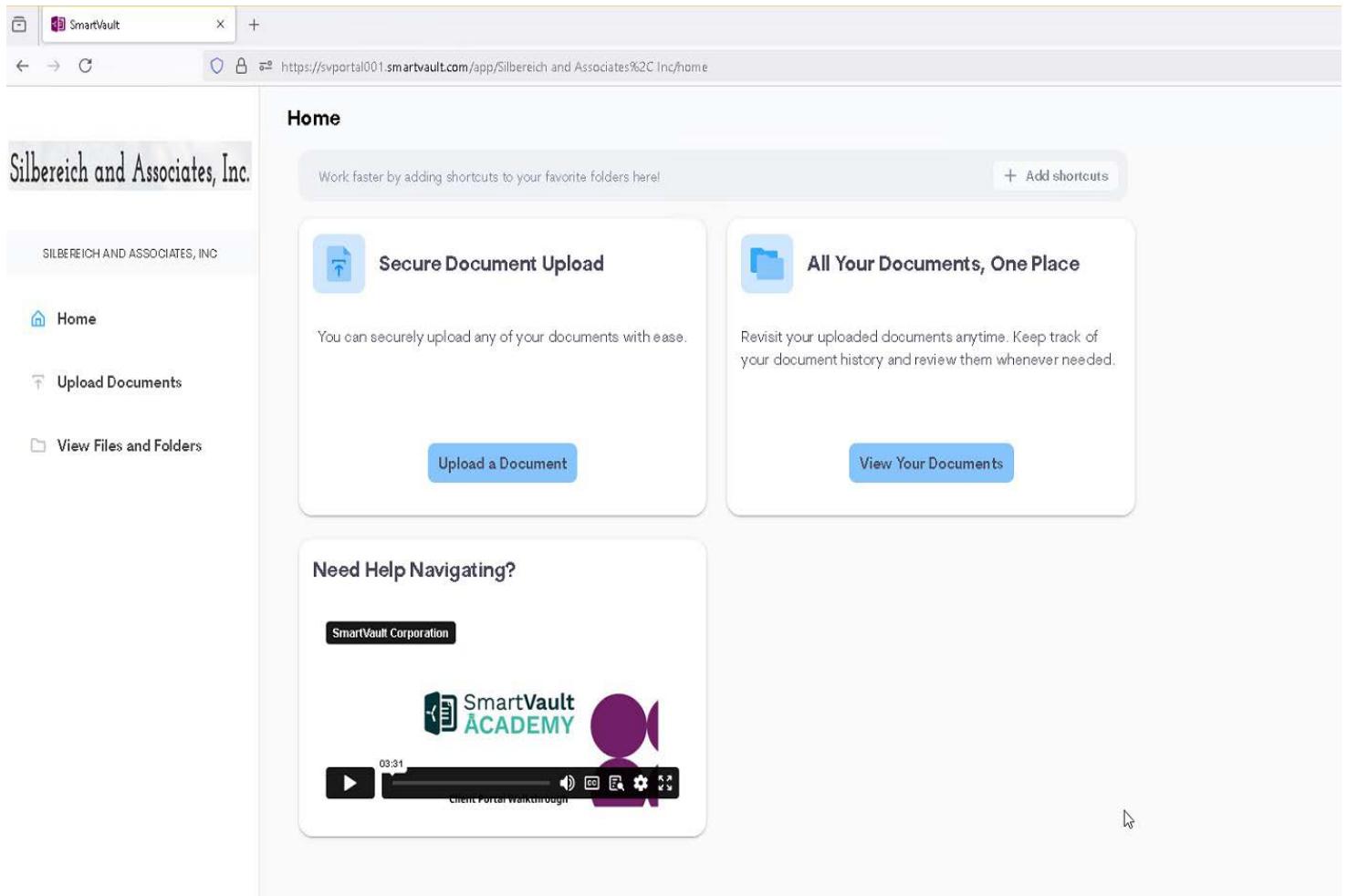
Password
 SHOW

Remember email

[Can't sign in?](#)

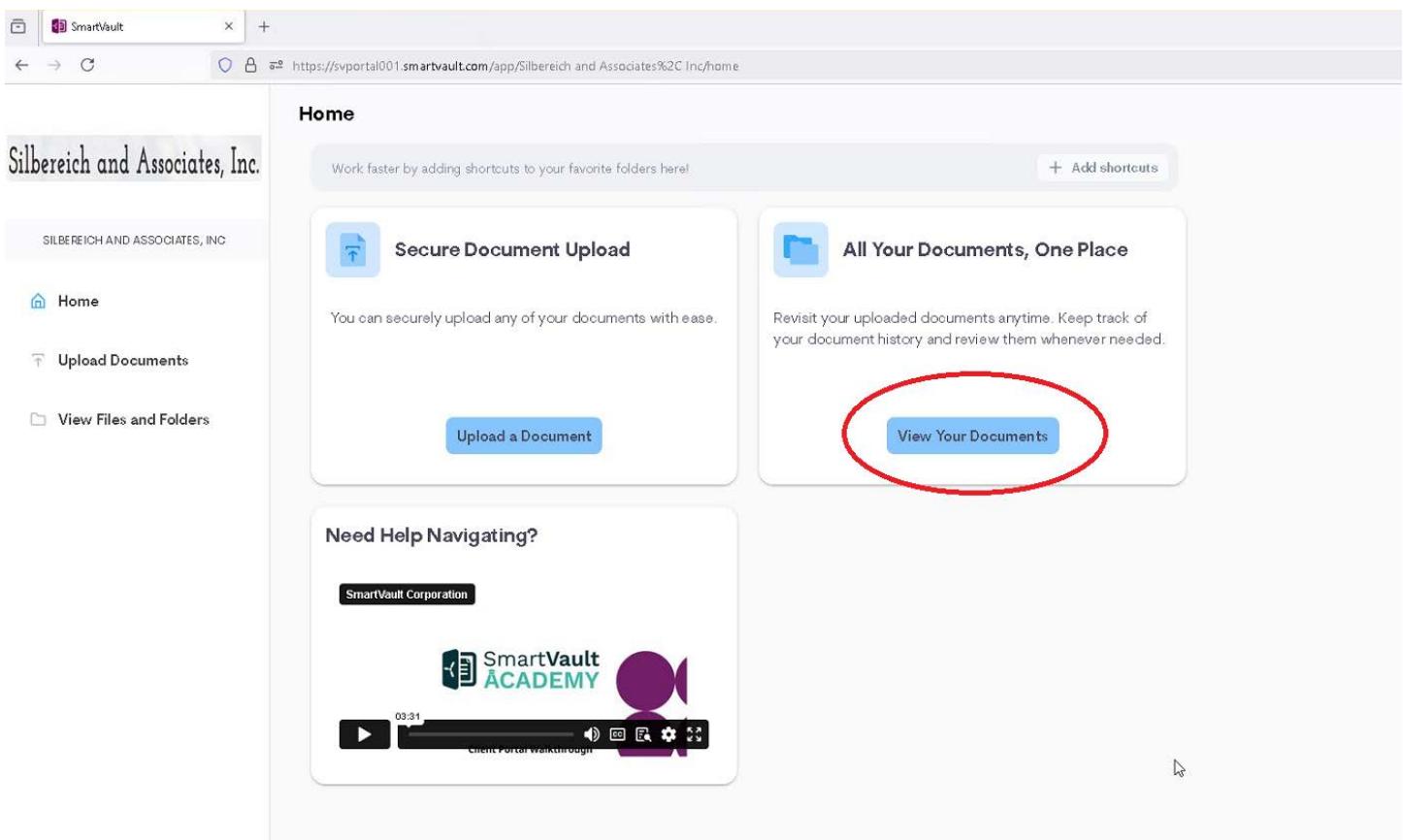
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4. Once you logged in you will see your Home page account. On the center column by default you will find the Secure Document Upload shortcut section to securely upload your document. In this center column you will also find shortcut to view your documents in All Your Documents, One Place section.



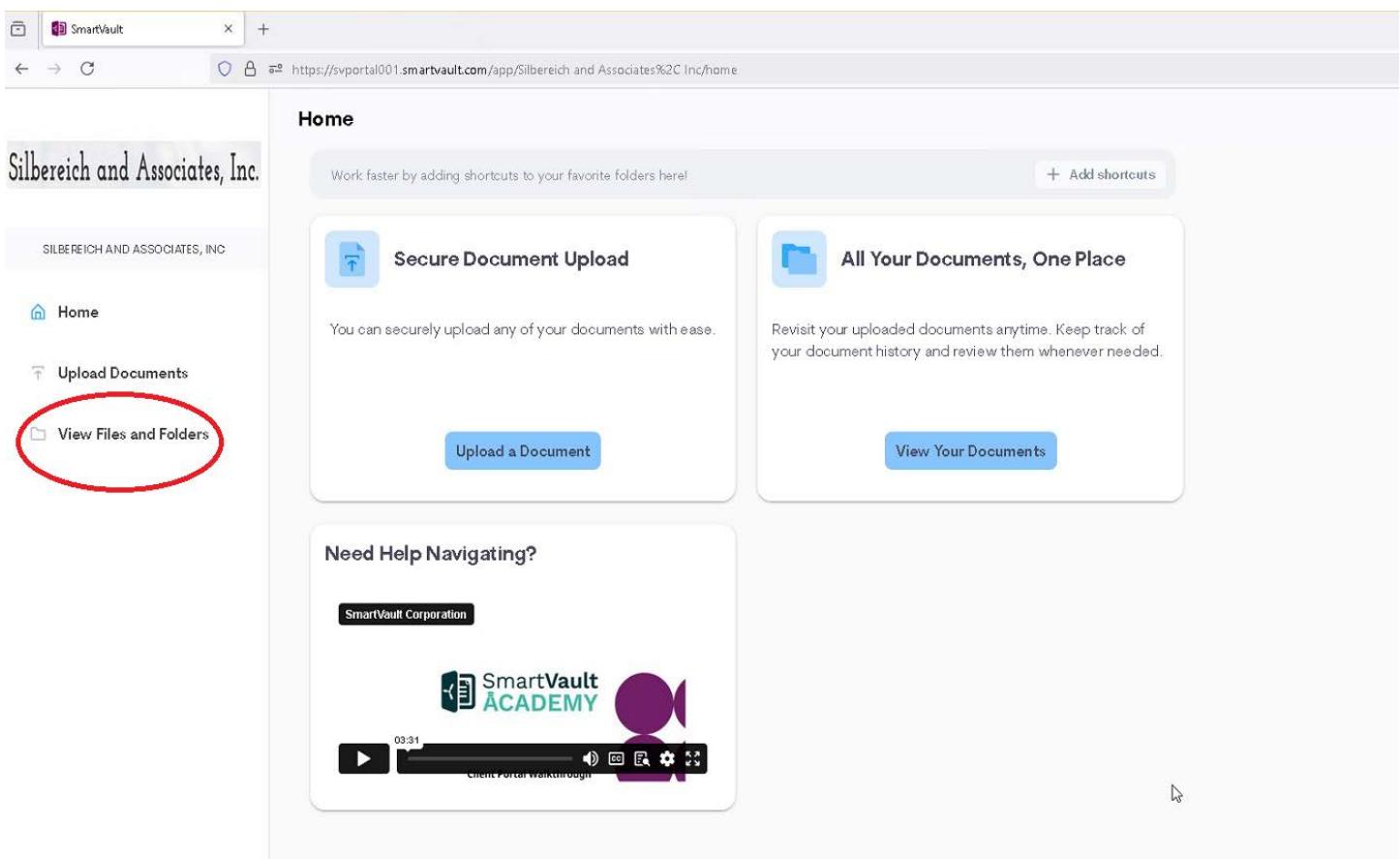
The screenshot shows the SmartVault Home page for Silbereich and Associates, Inc. The browser title bar reads "SmartVault" and the URL is "https://svportal001.smartvault.com/app/Silbereich and Associates%2C Inc/home". The page has a header with a "Home" button and a "Secure Document Upload" button. The main content area is titled "Home" and contains two main sections: "Secure Document Upload" and "All Your Documents, One Place". The "Secure Document Upload" section has a "Upload a Document" button. The "All Your Documents, One Place" section has a "View Your Documents" button. On the left sidebar, there are links for "Home", "Upload Documents", and "View Files and Folders". At the bottom, there is a "Need Help Navigating?" section featuring a video player for the "SmartVault ACADEMY Client Portal Walkthrough" video, which is 03:31 minutes long.

5. To DOWNLOAD your tax returns, please click the blue "View Your Documents" button from the All Your Documents, One Place" shortcut section.



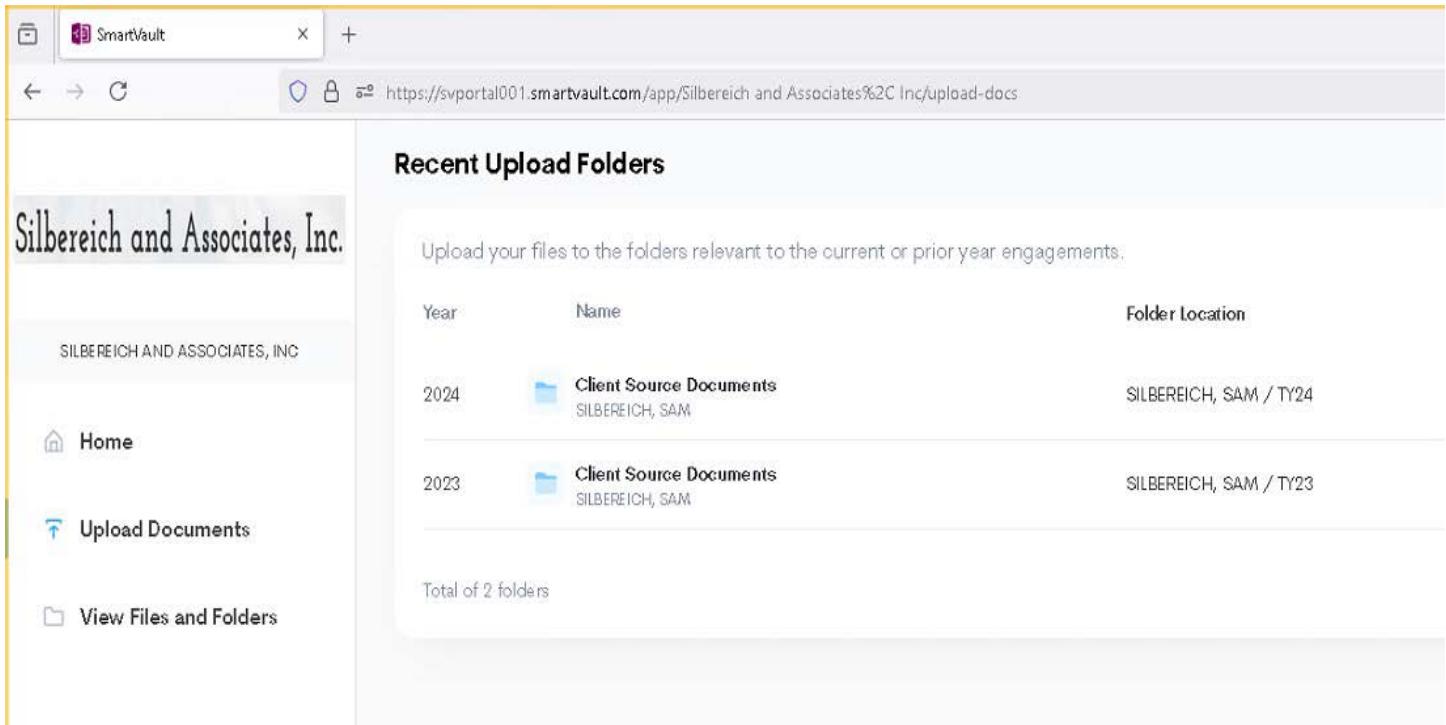
The screenshot shows the SmartVault Home page. At the top, there is a navigation bar with a back/forward button, a refresh button, and a search bar containing the URL <https://svportal001.smartvault.com/app/Silbereich and Associates%2C Inc/home>. Below the navigation bar, the page title is "Home" and the company name "Silbereich and Associates, Inc." is displayed. On the left, a sidebar menu lists "Home", "Upload Documents", and "View Files and Folders". The main content area features two main sections: "Secure Document Upload" (with a "Upload a Document" button) and "All Your Documents, One Place" (with a "View Your Documents" button, which is circled in red). Below these sections is a "Need Help Navigating?" section containing a video player for the "SmartVault ACADEMY Client Portal Walkthrough".

Or you could also click on the "View Files and Folders" link on the left-hand side menu.



This screenshot is identical to the one above, showing the SmartVault Home page. The only difference is that the "View Files and Folders" link in the sidebar menu is circled in red, highlighting the alternative navigation path.

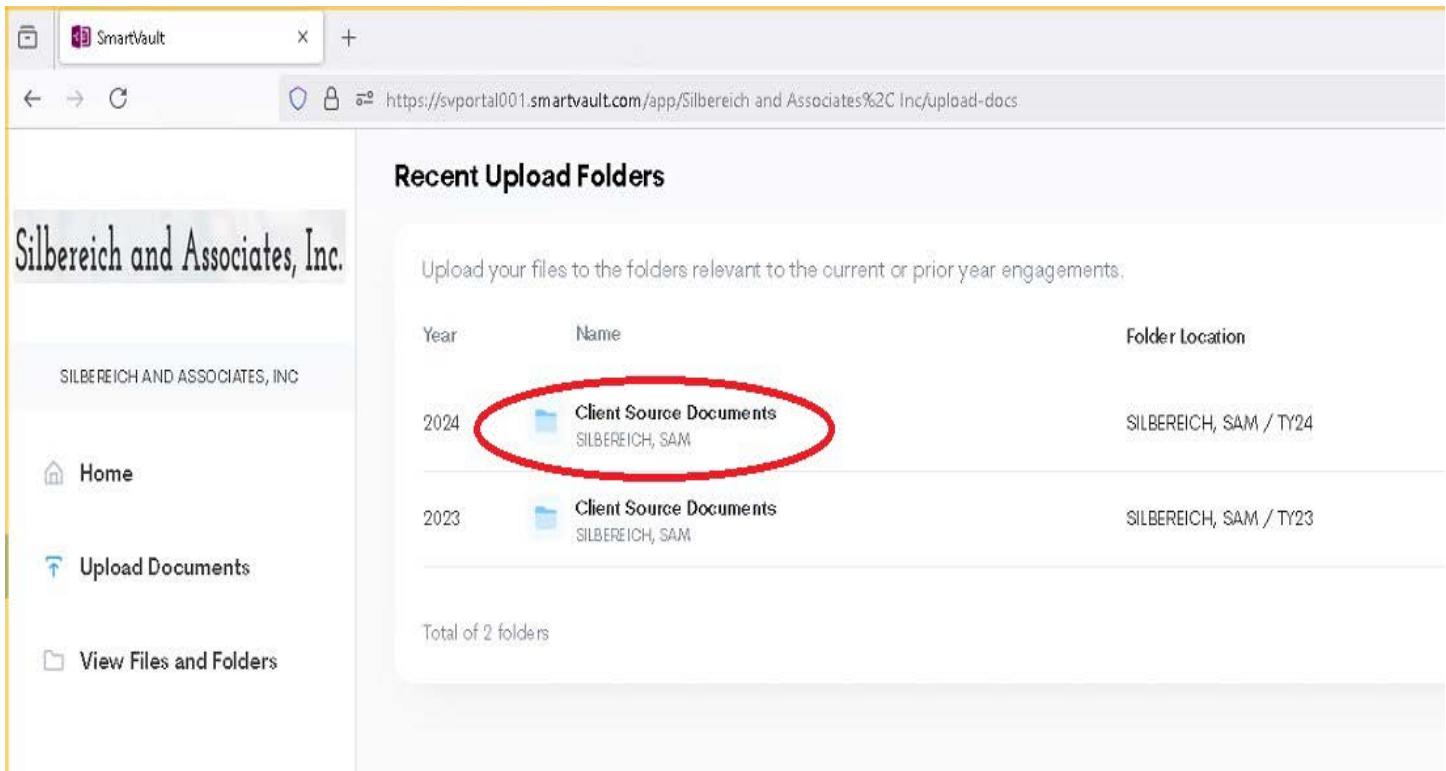
6. Once you clicked either links to view your folder and files, you will find folders according to your tax years.



The screenshot shows the SmartVault web interface. The left sidebar has a logo for 'Silbereich and Associates, Inc.' and navigation links: Home, Upload Documents, and View Files and Folders. The main content area is titled 'Recent Upload Folders' and displays a table of uploaded folders. The table has columns for Year, Name, and Folder Location. It shows two entries: '2024 Client Source Documents SILBEREICH, SAM' and '2023 Client Source Documents SILBEREICH, SAM'. A note at the bottom says 'Total of 2 folders'.

Year	Name	Folder Location
2024	Client Source Documents SILBEREICH, SAM	SILBEREICH, SAM / TY24
2023	Client Source Documents SILBEREICH, SAM	SILBEREICH, SAM / TY23

7. Click your tax year icon labeled "Client Source Documents" to open the folders.

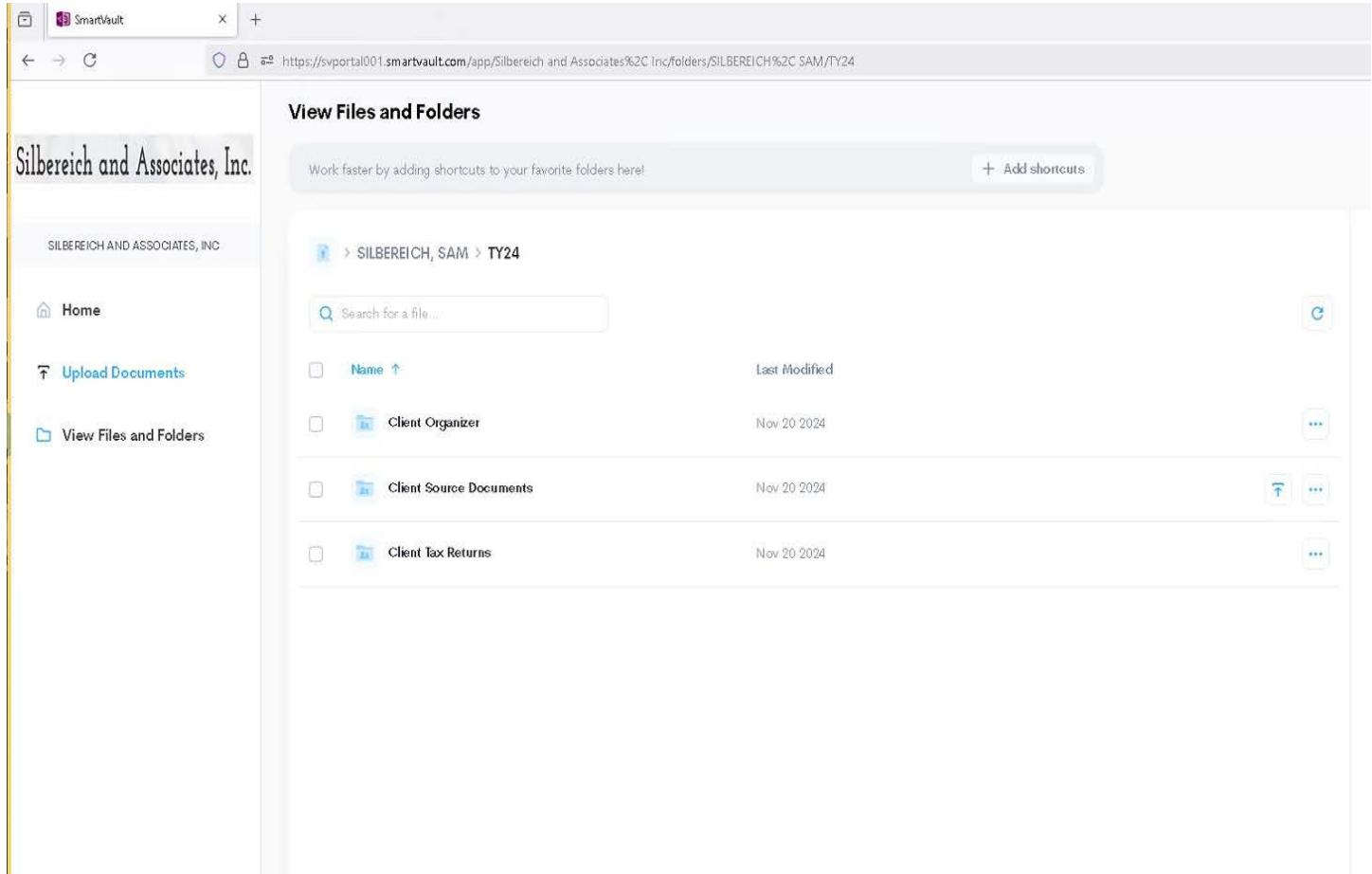


The screenshot shows the SmartVault interface with the 'Client Source Documents' folder for the year 2024 highlighted with a red oval. The rest of the interface is identical to the previous screenshot, showing the 'Recent Upload Folders' table and navigation sidebar.

Year	Name	Folder Location
2024	Client Source Documents SILBEREICH, SAM	SILBEREICH, SAM / TY24
2023	Client Source Documents SILBEREICH, SAM	SILBEREICH, SAM / TY23

8. Here you will find your tax return or any other documents you have ever uploaded. There are 3 folders in this page. **Client Organizer** should be an empty folder unless you have

requested a PDF copy of your business or personal tax organizer form. **Client Source Documents** holds all files you uploaded for the given tax year. And **Client Tax Returns** holds your copy of your tax returns as well as the IRS acceptance letter once it has been filed.



The image shows a screenshot of the SmartVault web interface. The left sidebar shows the company name "Silbereich and Associates, Inc." and navigation links for "Home", "Upload Documents", and "View Files and Folders". The main content area is titled "View Files and Folders" and shows a breadcrumb navigation path: "SILBEREICH AND ASSOCIATES, INC. > SILBEREICH, SAM > TY24". Below this is a search bar with the placeholder "Search for a file...". The main list displays three items:

	Name	Last Modified	Actions
<input type="checkbox"/>	Client Organizer	Nov 20 2024	
<input type="checkbox"/>	Client Source Documents	Nov 20 2024	
<input type="checkbox"/>	Client Tax Returns	Nov 20 2024	

9. To DOWNLOAD your tax return, please click on the "Client Tax Returns" icon link. If your tax return is done, you will find it in this folder.

Silbereich and Associates, Inc.

SILBEREICH AND ASSOCIATES, INC

View Files and Folders

Work faster by adding shortcuts to your favorite folders here! [+ Add shortcuts](#)

[SILBEREICH, SAM > TY24](#)

Search for a file...

[Name ↑](#) [Last Modified](#)

[Client Organizer](#) Nov 20 2024 [...](#)

[Client Source Documents](#) Nov 20 2024 [...](#)

[Client Tax Returns](#) Nov 20 2024 [...](#)



10. Once the folder is opened, you will have the option to download the copy of your tax return and the IRS e-file acceptance letter.

Silbereich and Associates, Inc.

SILBEREICH AND ASSOCIATES, INC

View Files and Folders

Work faster by adding shortcuts to your favorite folders here! [+ Add shortcuts](#)

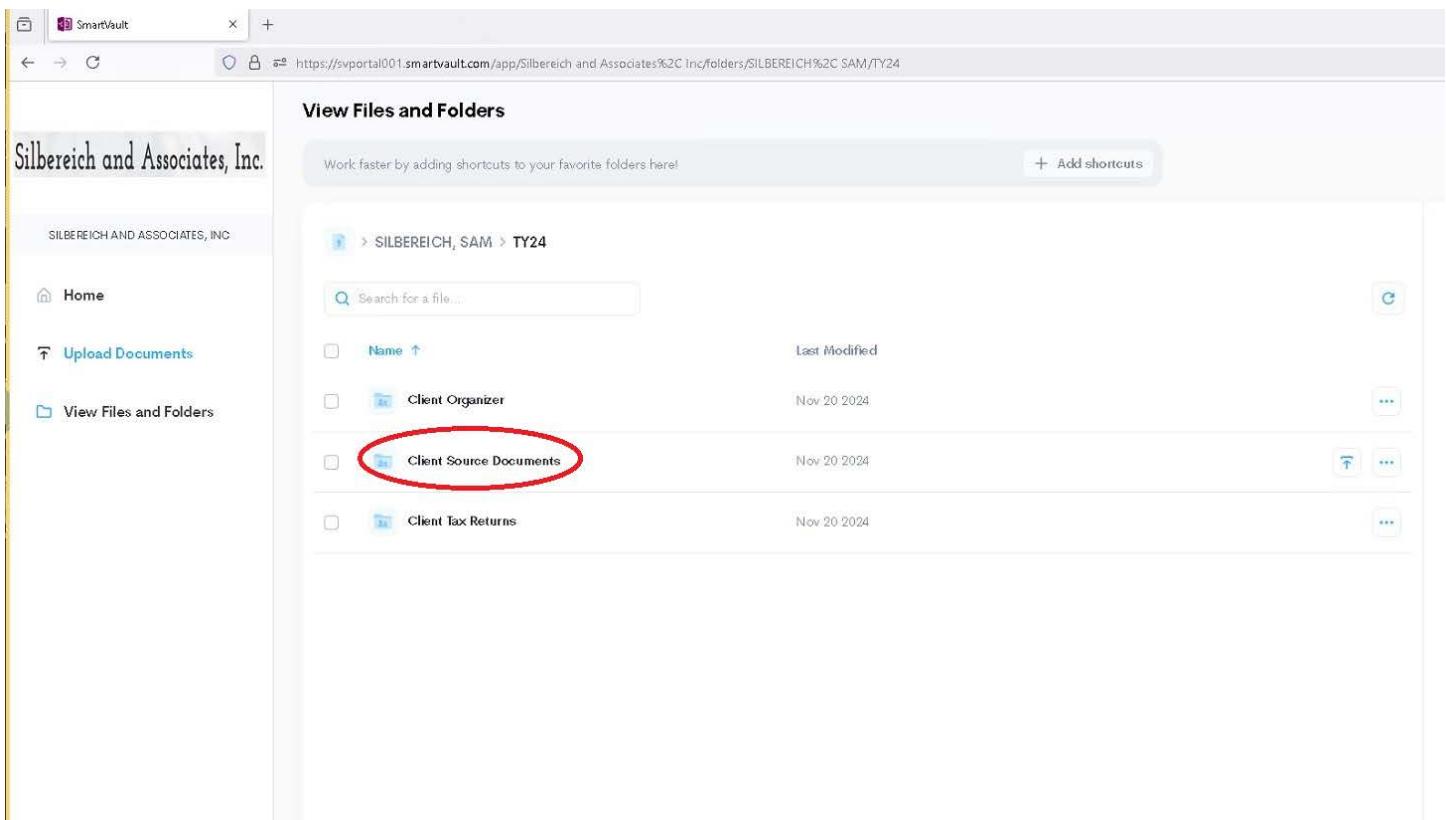
[SILBEREICH, SAM > TY24 > Client Tax Returns](#)

Search for a file...

[Name ↑](#) [Last Modified](#)

 This folder is empty

11. To UPLOAD your documents, please click on the Client Source Document icon link.

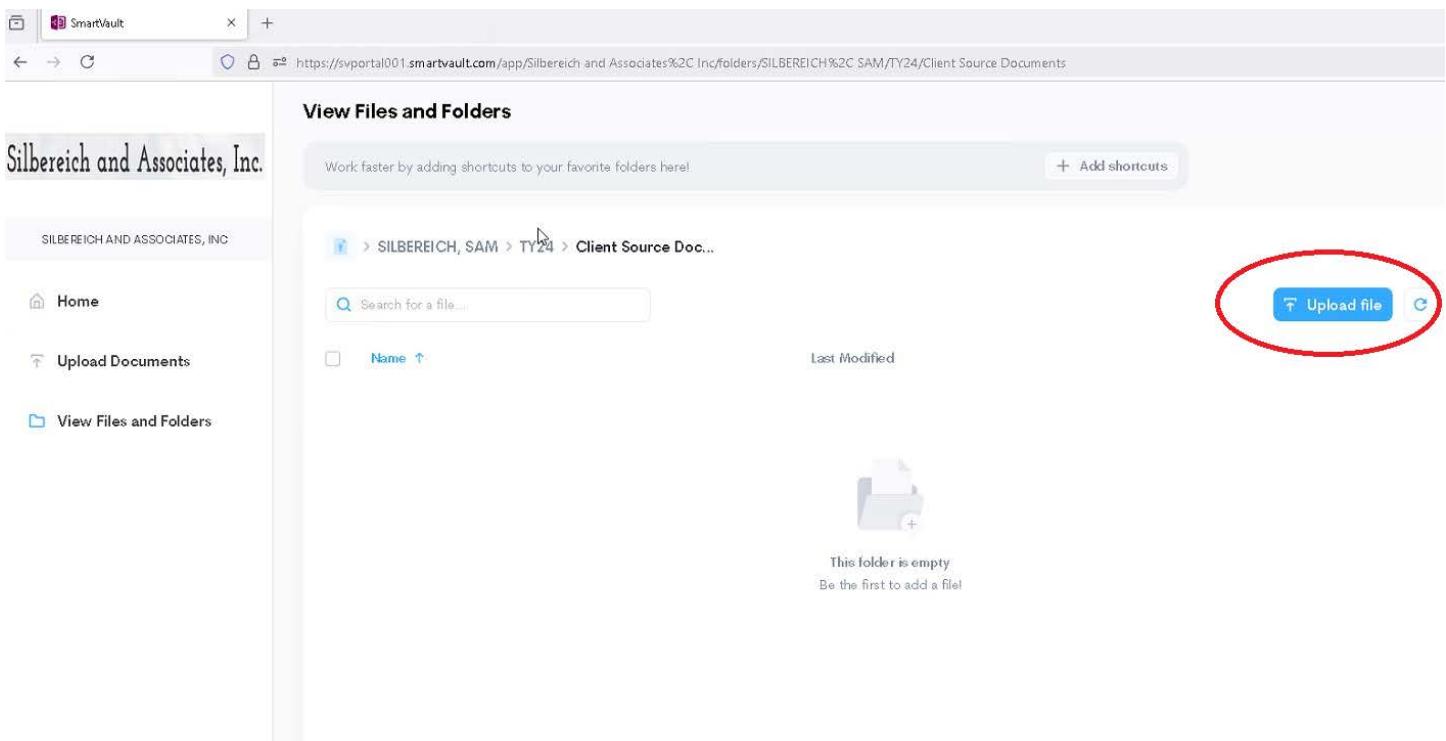


The screenshot shows the SmartVault interface. The left sidebar has links for Home, Upload Documents, and View Files and Folders. The main area is titled 'View Files and Folders' and shows a breadcrumb path: Home > SILBEREICH, SAM > TY24. A search bar is at the top. Below is a list of folders:

Name	Last Modified	Actions
Client Organizer	Nov 20 2024	... (three dots)
Client Source Documents	Nov 20 2024	... (three dots)
Client Tax Returns	Nov 20 2024	... (three dots)

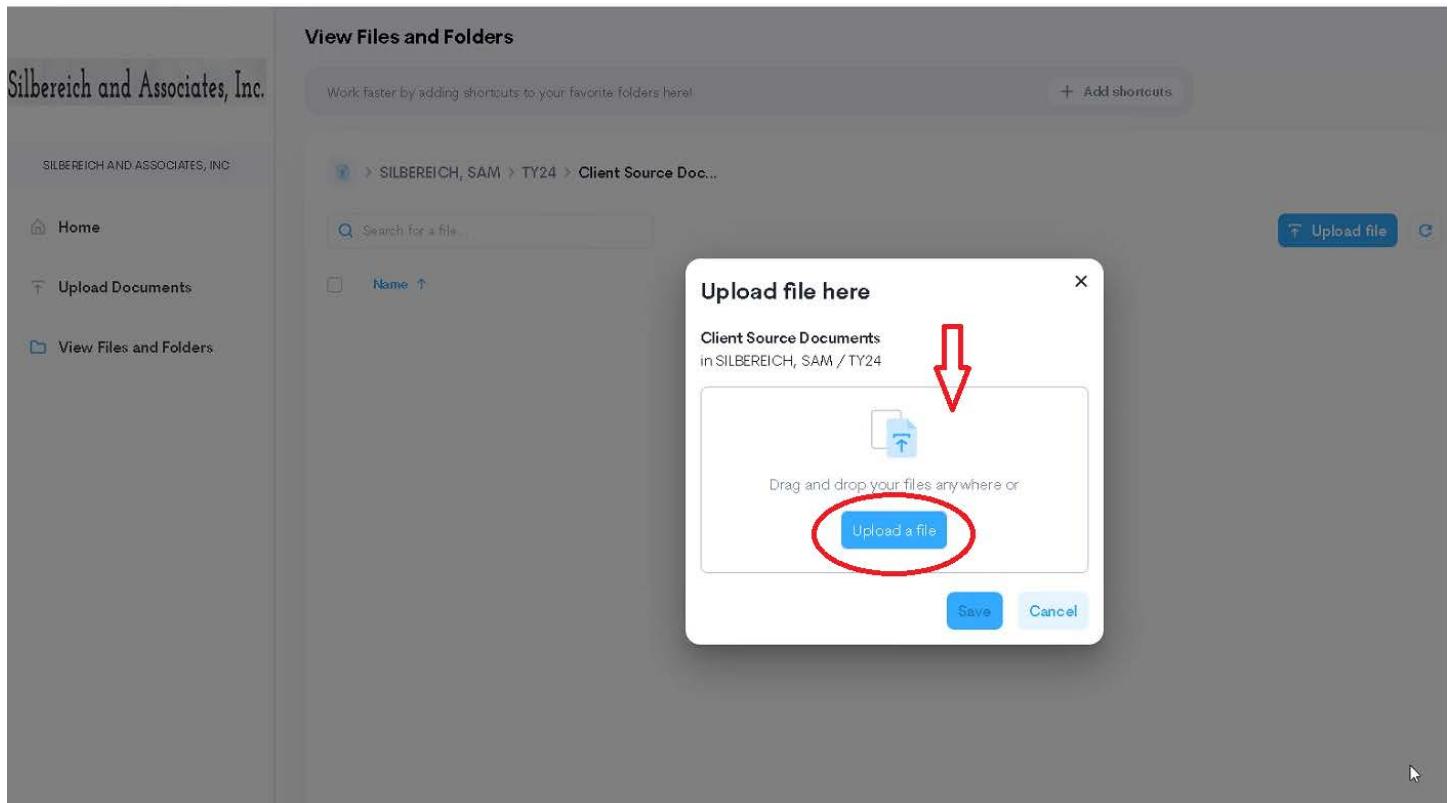
The 'Client Source Documents' folder is circled in red.

12. Once the page is loaded, click on the blue 'Upload file' button on the right side.

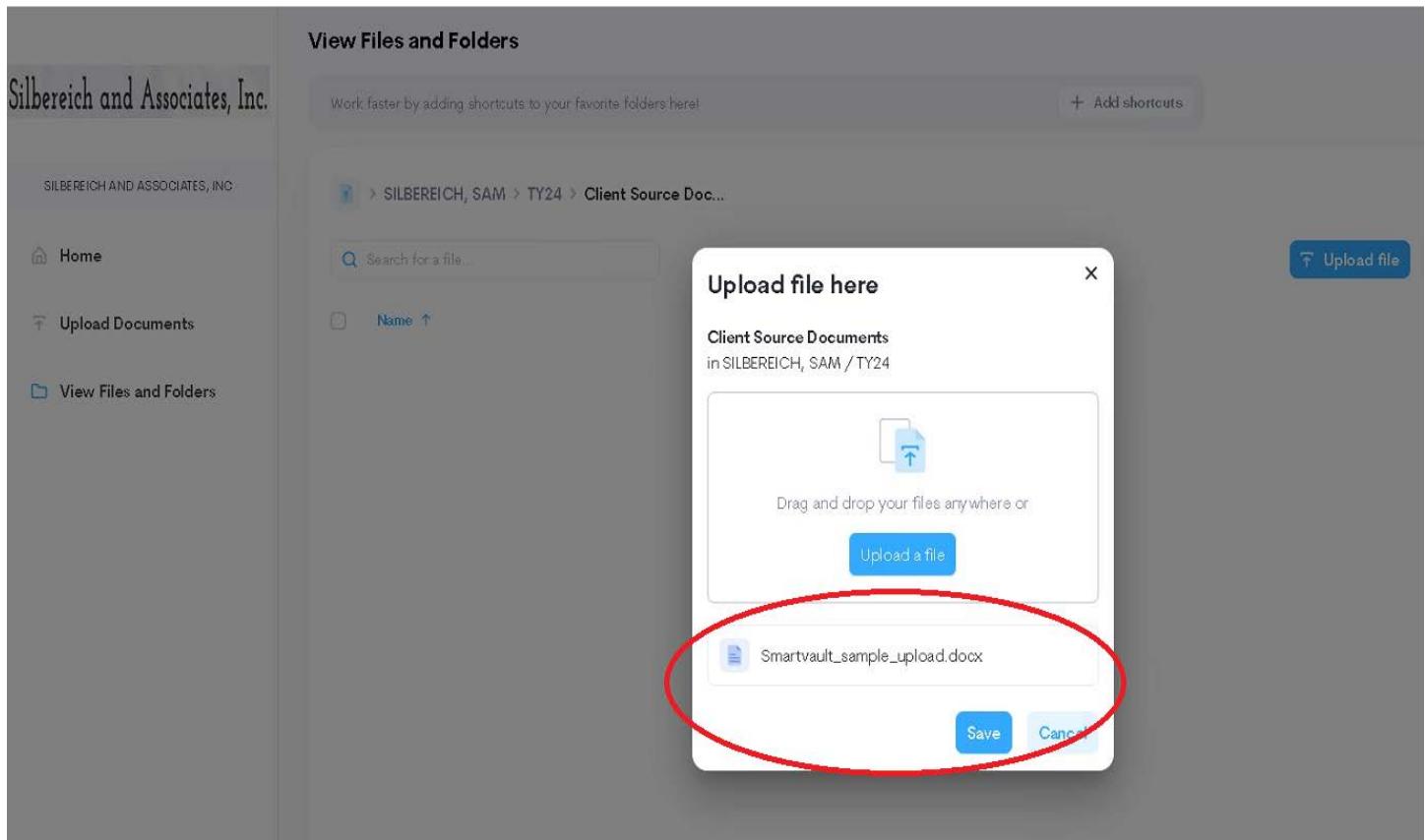


The screenshot shows the SmartVault interface with the 'Client Source Documents' folder open. The breadcrumb path is now: Home > SILBEREICH, SAM > TY24 > Client Source Doc... The right side of the screen has a large blue 'Upload file' button with a white arrow icon, which is circled in red. Below the button is a placeholder message: 'This folder is empty' and 'Be the first to add a file!' with a plus sign icon.

13. A pop up “Upload File here” window will appear where you could drag and drop your document to be uploaded or click on the blue “Upload a file” button to browse for your document to be uploaded from your PC or Mac.



14. Once your file or document is ready to be uploaded, the name of the file or document will appear on the Upload file here window. Please confirm it then click the blue “Save button to upload.



15. The file or document will be in the SmartVault. Silbereich and Associates gets notification that you have uploaded a file.

A screenshot of the SmartVault 'View Files and Folders' page. The file 'Smartvault_sample_upload.docx' is listed in the 'Client Source Documents' folder. The file is a Microsoft Word document (docx) and was uploaded on Dec 16 2024. The 'Save' and 'Cancel' buttons from the previous dialog are visible at the bottom right of the list.

