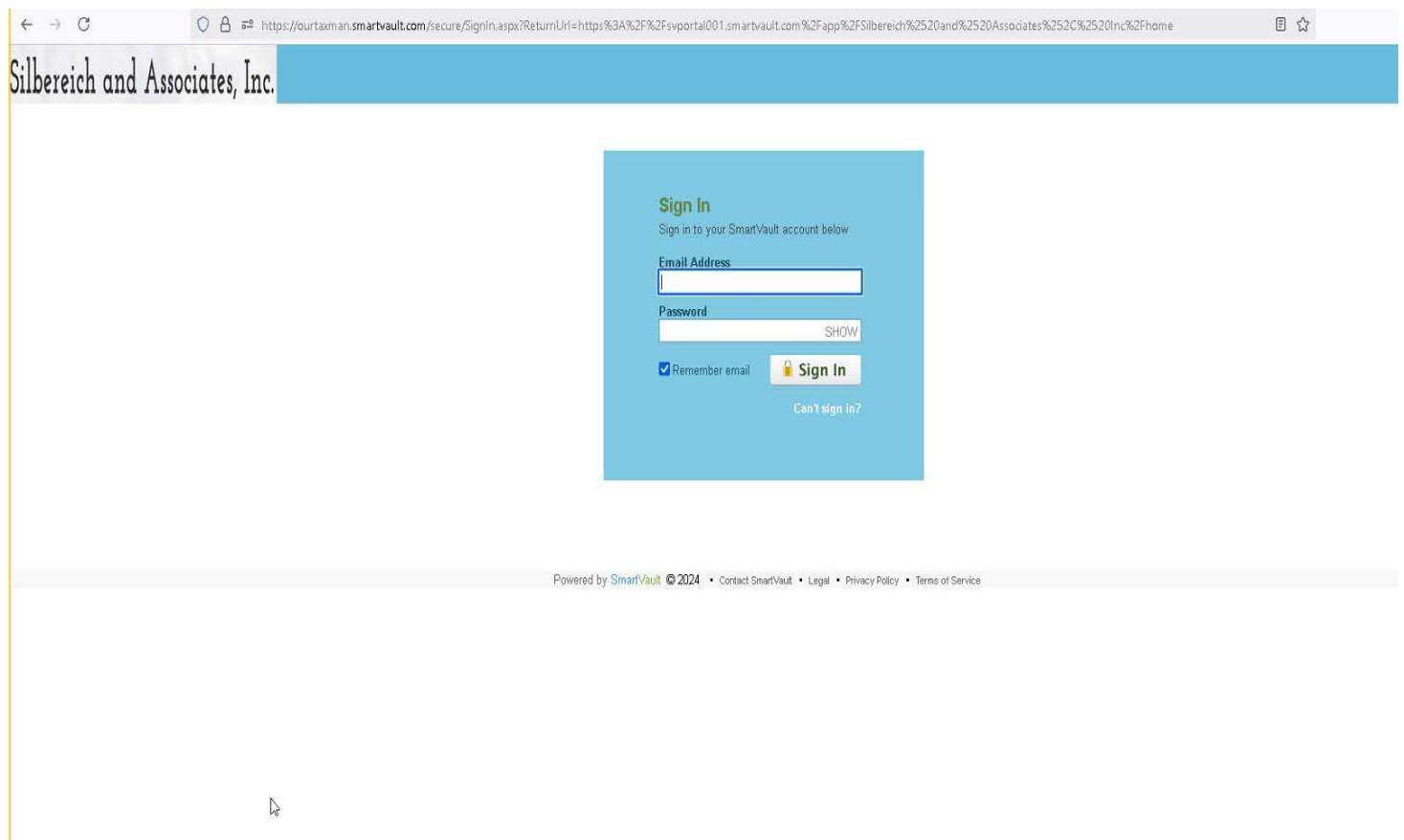


Silbereich and Associates, Inc.

Step-by-step Guide Through the SmartVault Portal

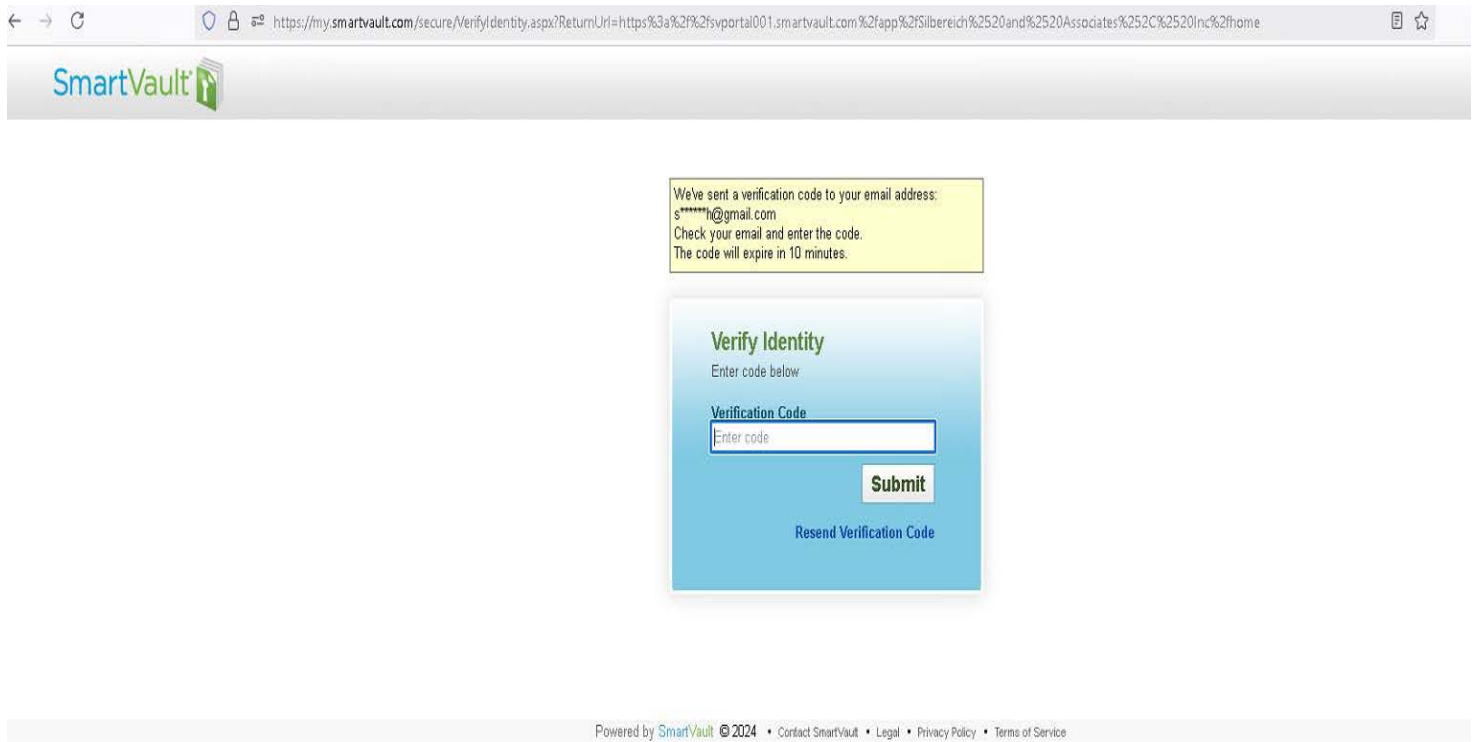
This is a guide for all new users and current users of Silbereich and Associates' SmartVault. Current users should follow the normal login steps to access the portal. New users should have already received an invite link via email and should just click that link to complete the setup.

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

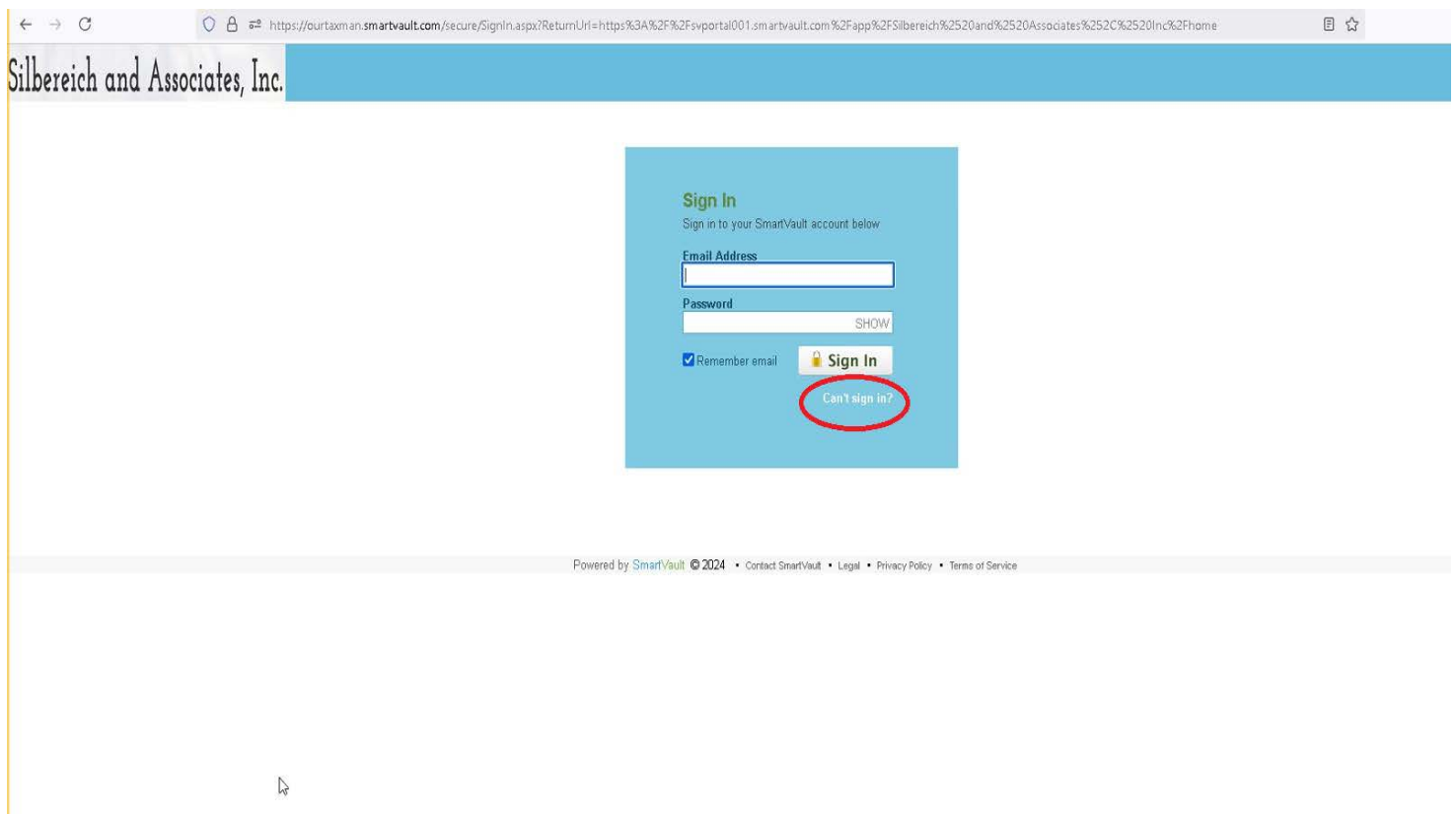
A screenshot of a web browser displaying the SmartVault login page. The browser's address bar shows the URL: https://ourtaxman.smartvault.com/secure/SignIn.aspx?ReturnUrl=https%3A%2F%2Fportal001.smartvault.com%2Fapp%2FSilbereich%2520and%2520Associates%252C%2520Inc%2FHome. The page has a blue header with the text "Silbereich and Associates, Inc." on the left. The main content area is white and features a blue-bordered box with the "Sign In" heading. Below the heading, it says "Sign in to your SmartVault account below". There are two input fields: "Email Address" and "Password". The "Password" field has a "SHOW" button to its right. Below the "Password" field is a checkbox labeled "Remember email" which is checked. To the right of the checkbox is a blue "Sign In" button. Below the button is a link that says "Can't sign in?". At the bottom of the page, there is a footer with the text "Powered by SmartVault © 2024" followed by links for "Contact SmartVault", "Legal", "Privacy Policy", and "Terms of Service".

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.

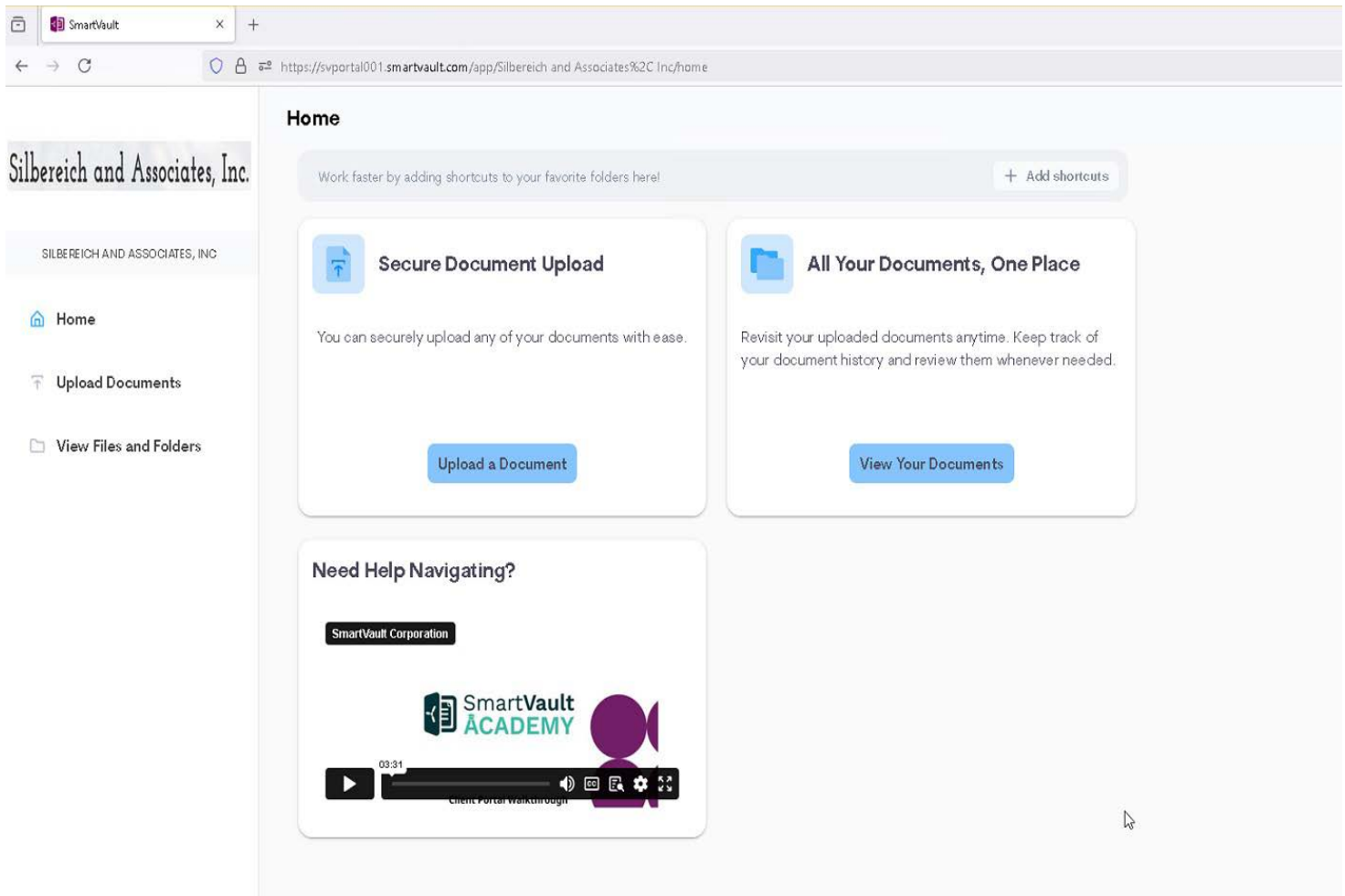
Once you clicked the signed in button, for security reason it will send a verification code to your email. Please enter this code in the verification field on the portal.



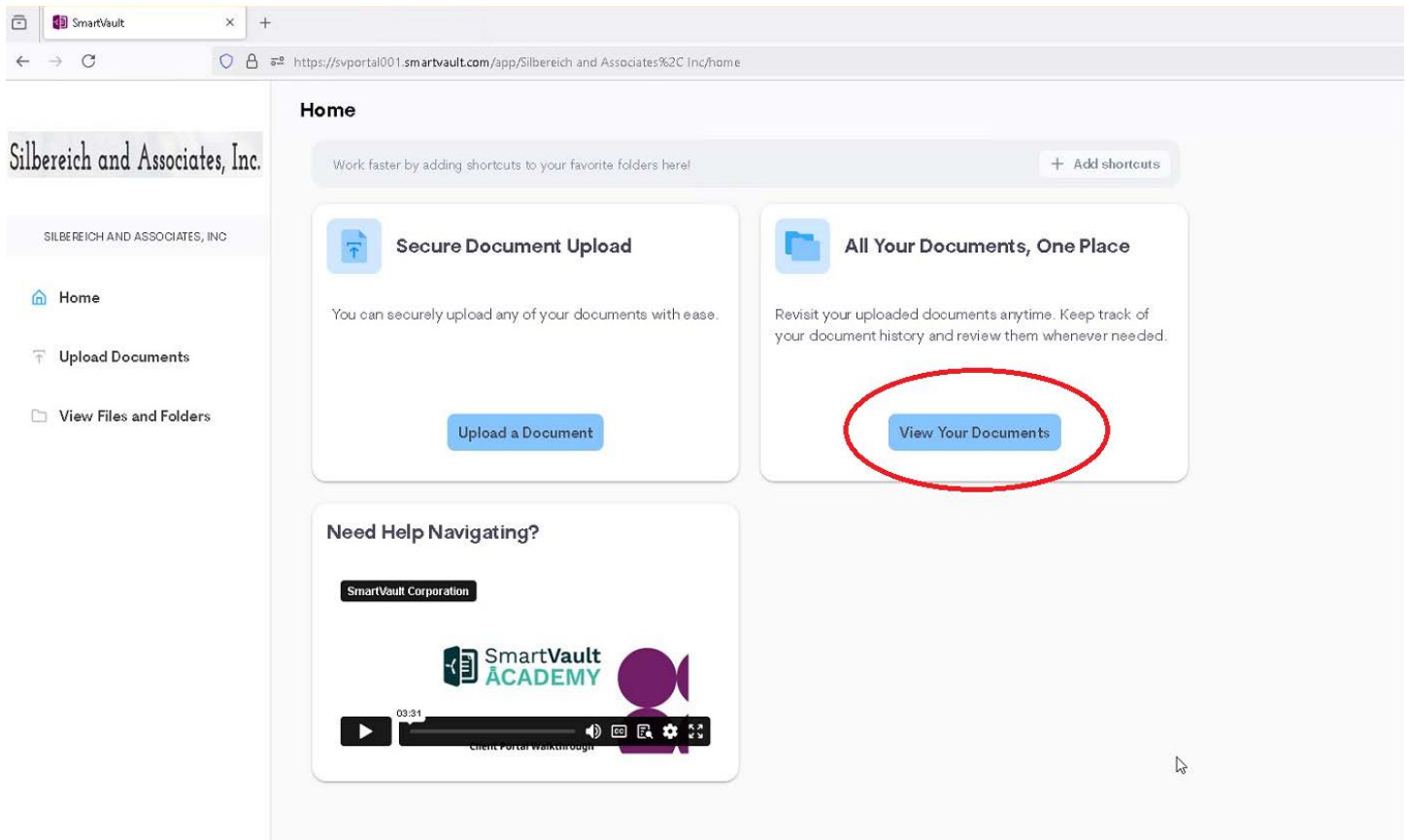
3. If you forgot your password, please reset it by clicking on the “Can’t sign in?” link.



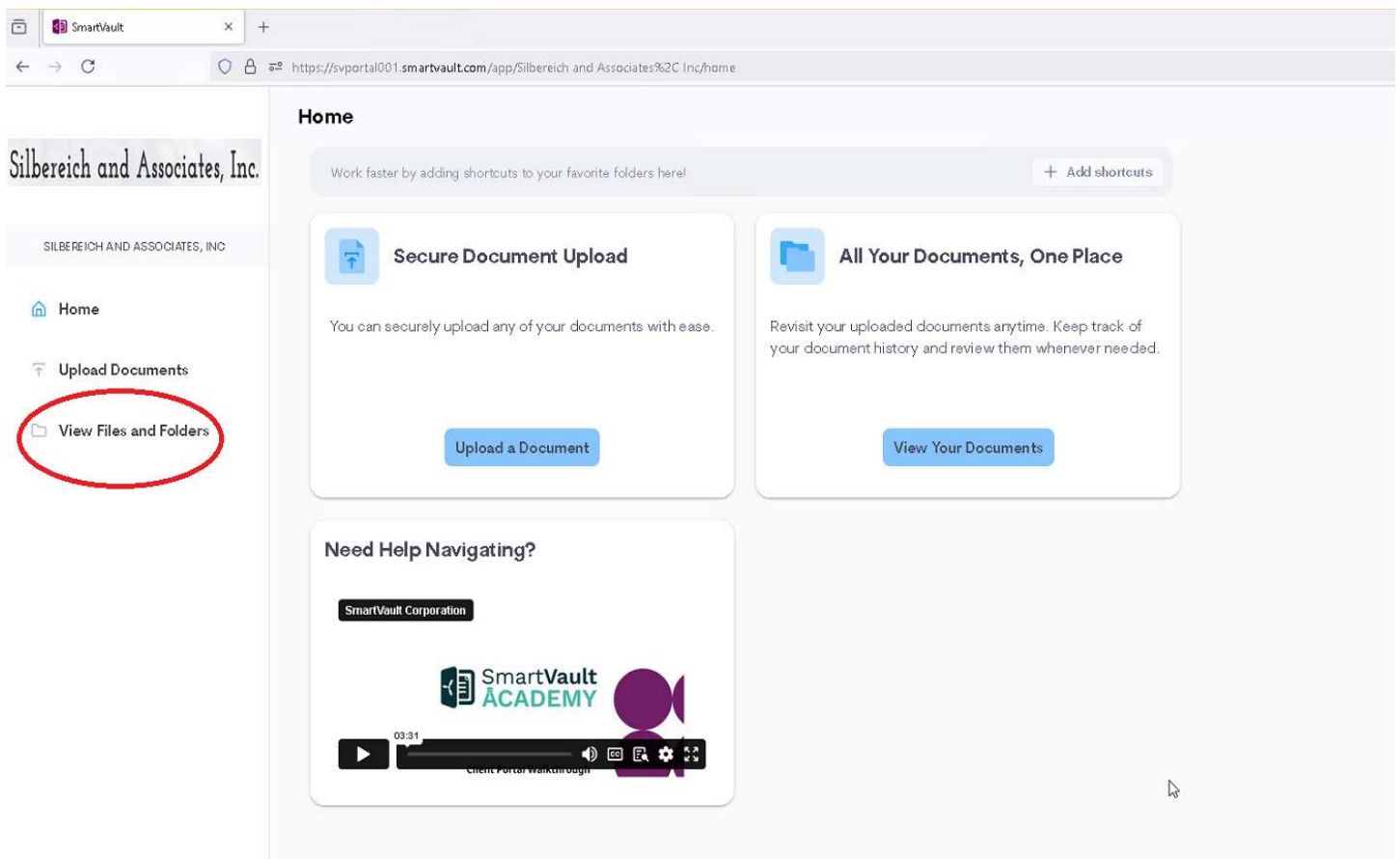
- Once you logged in you will see your Home page account. On the center column by default you will find the Secure Document Upload shortcut section to securely upload your document. In this center column you will also find shortcut to view your documents in All Your Documents, One Place section.



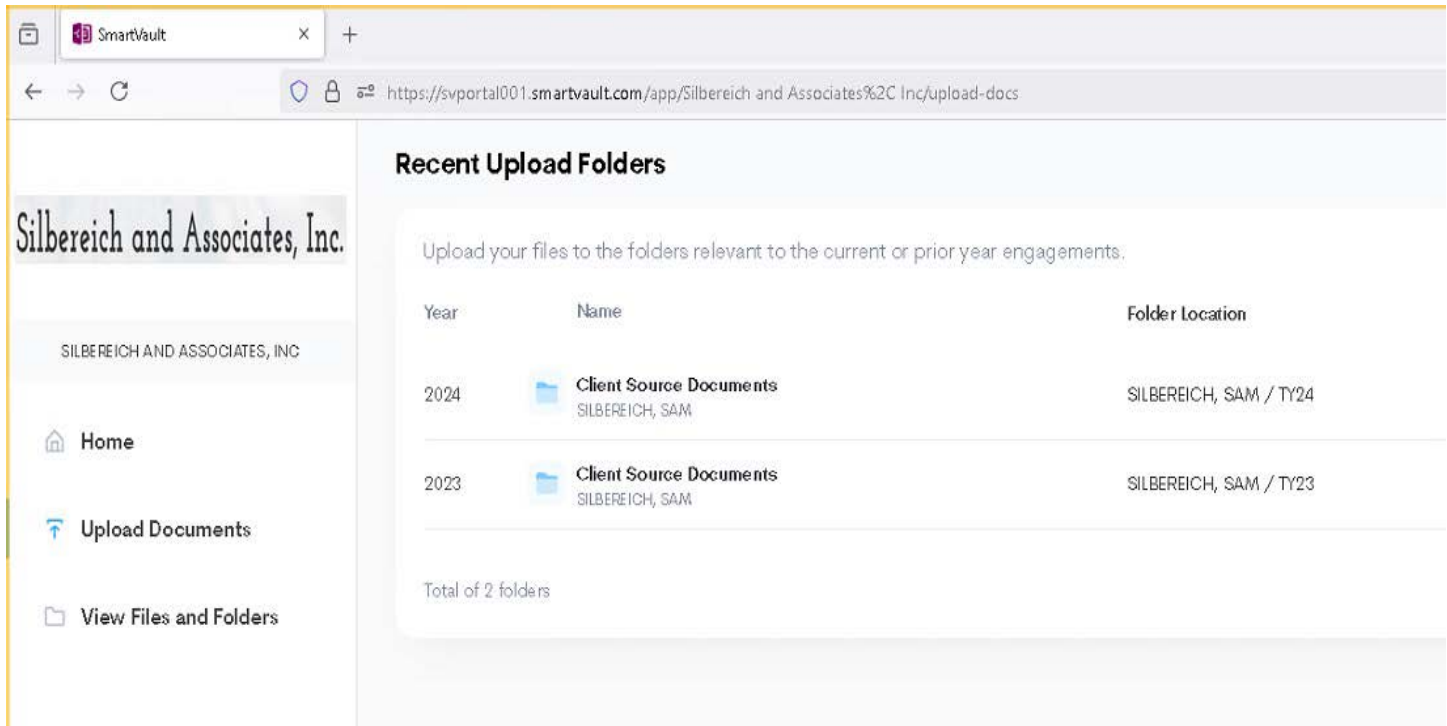
- To DOWNLOAD your tax returns, please click the blue "View Your Documents" button from the All Your Documents, One Place" shortcut section.



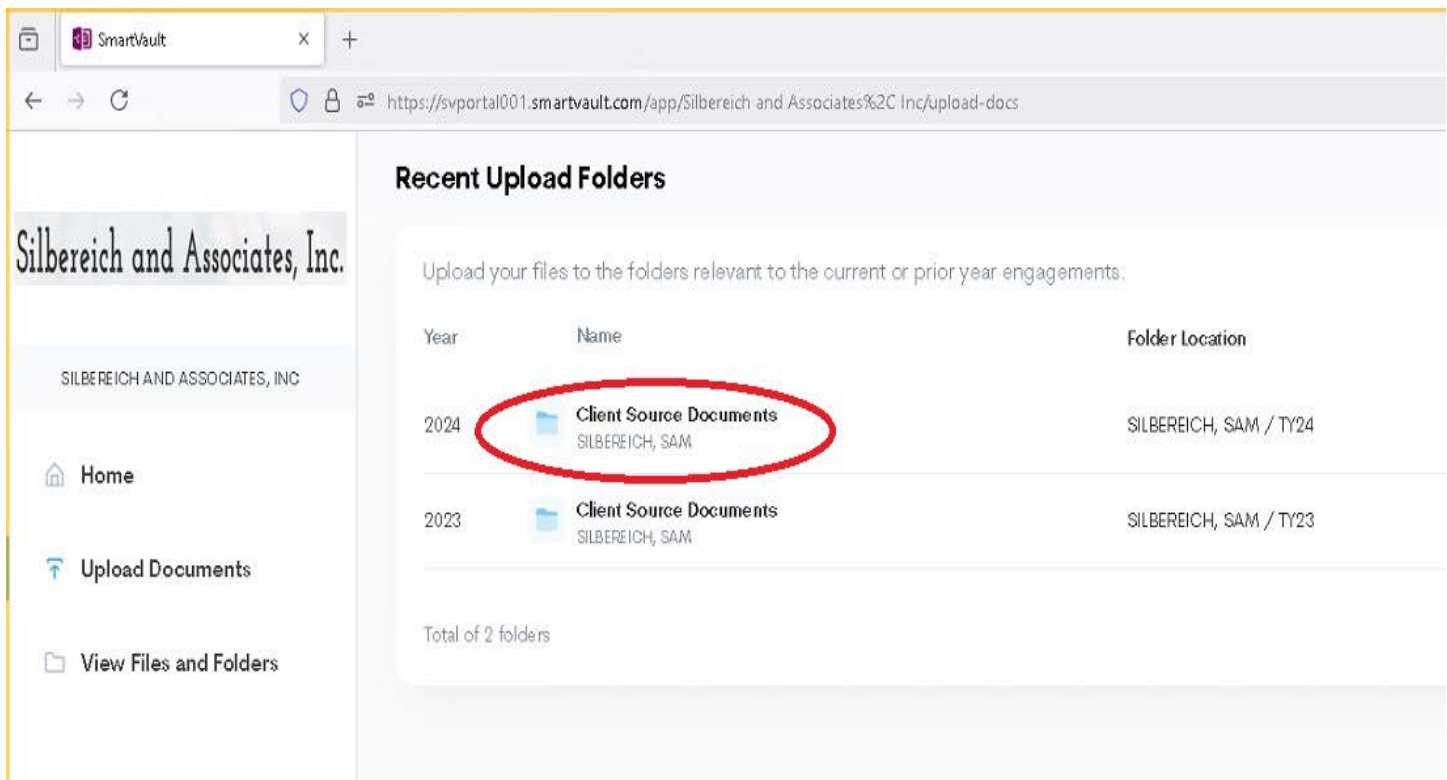
Or you could also click on the “View Files and Folders” link on the left-hand side menu.



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

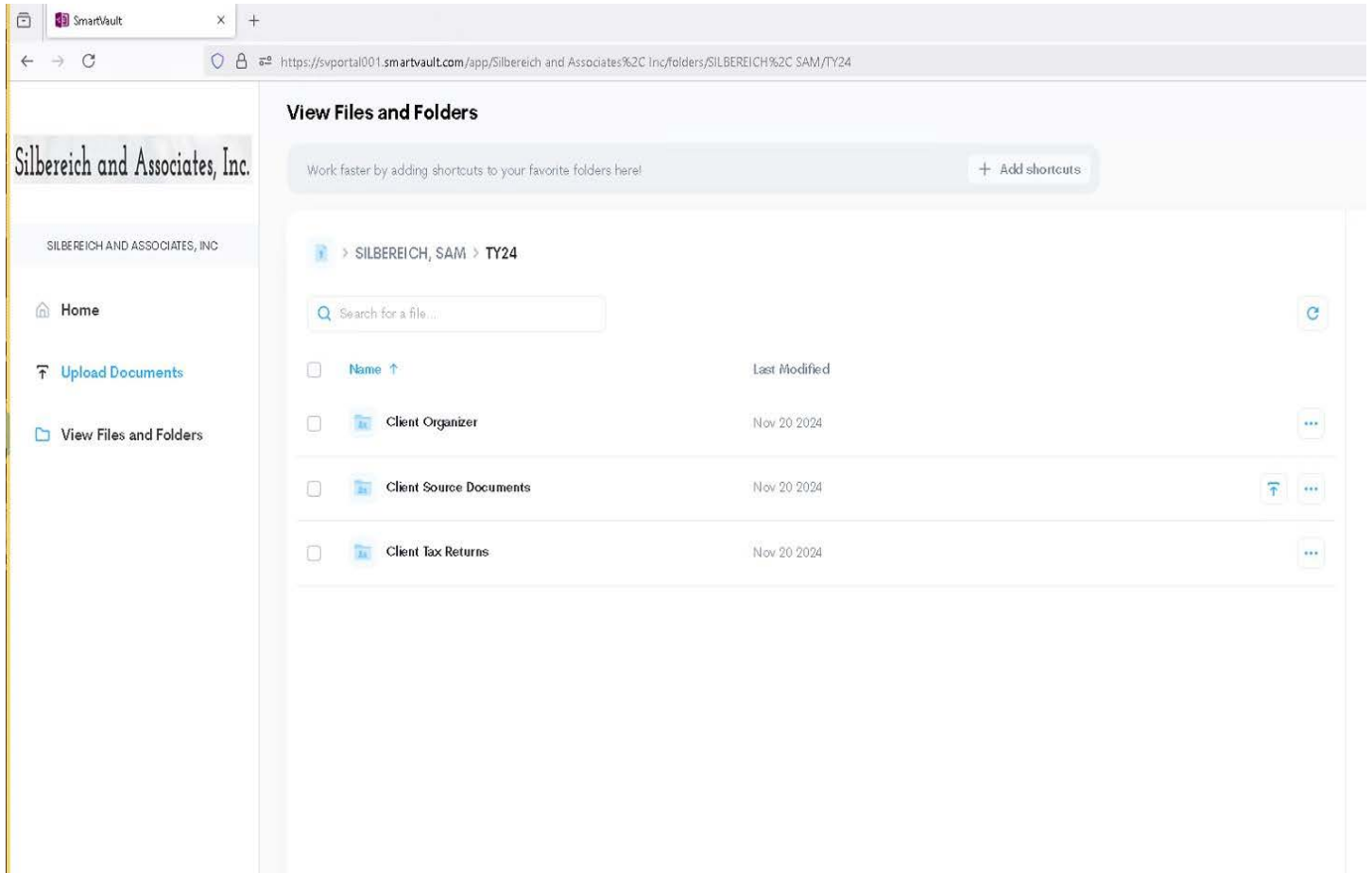


7. Click your tax year icon labeled “Client Source Documents” to open the folders.

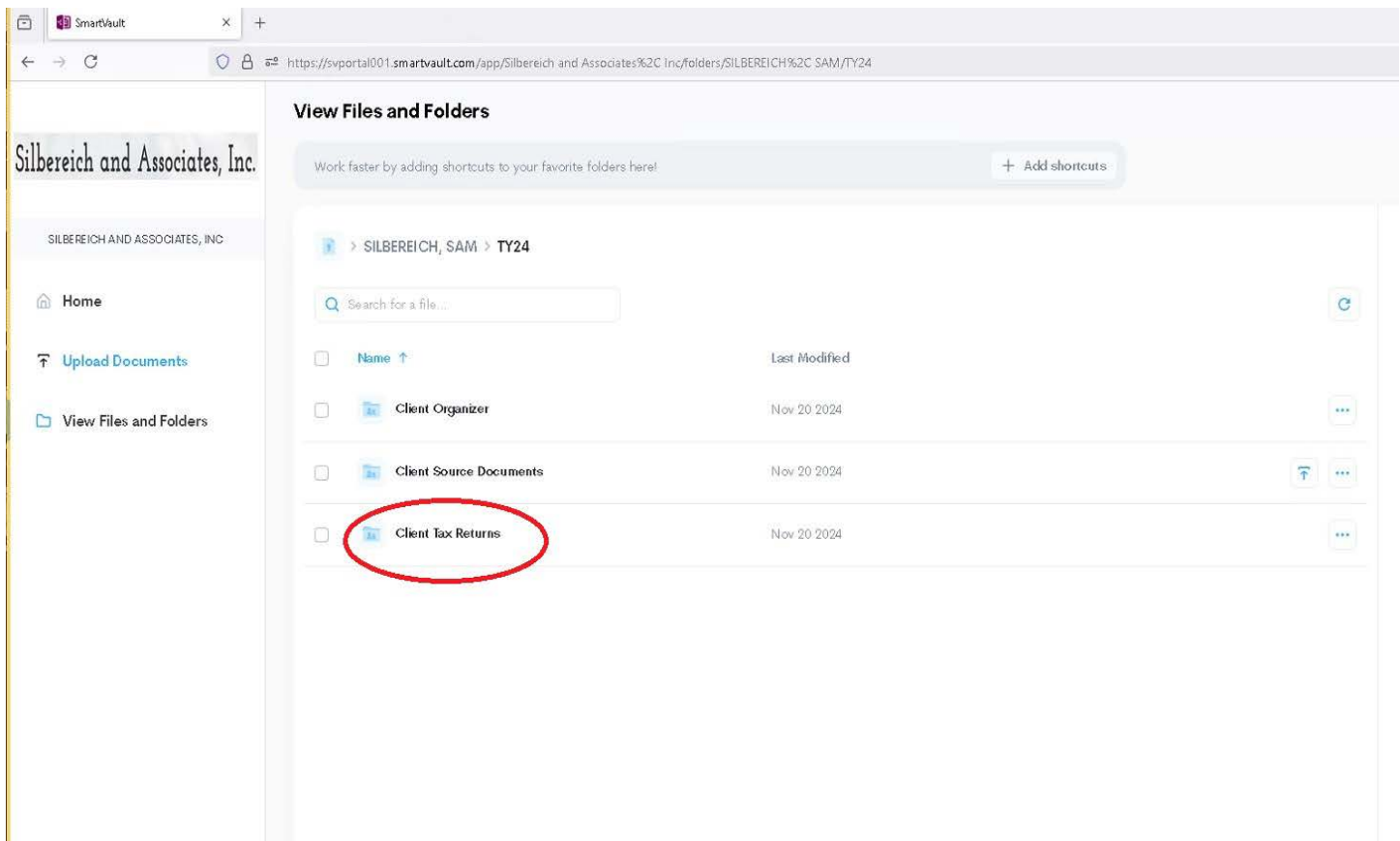


8. Here you will find your tax return or any other documents you have ever uploaded. There are 3 folders in this page. **Client Organizer** should be an empty folder unless you have

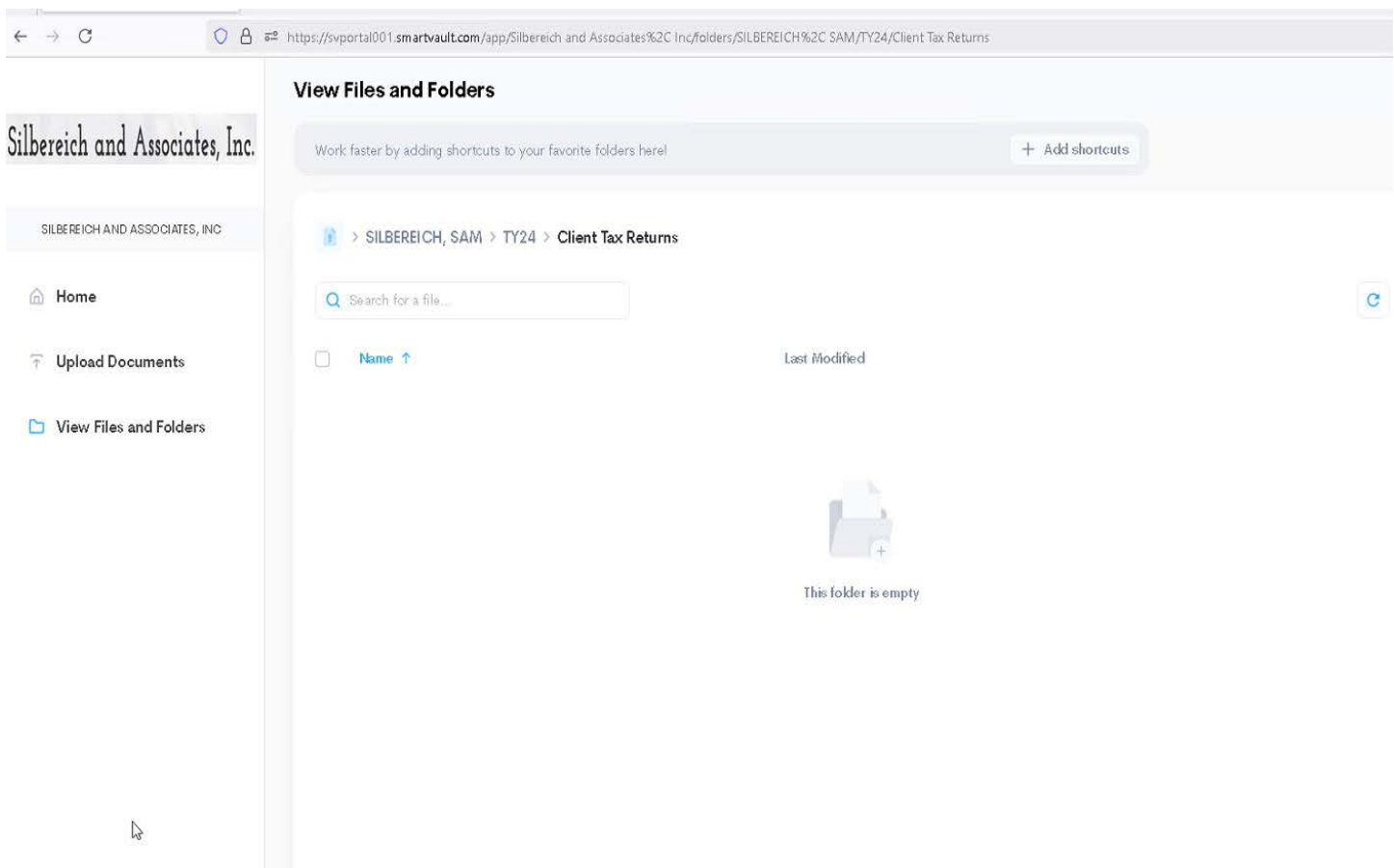
requested a PDF copy of your business or personal tax organizer form. **Client Source Documents** holds all files you uploaded for the given tax year. And **Client Tax Returns** holds your copy of your tax returns as well as the IRS acceptance letter once it has been filed.



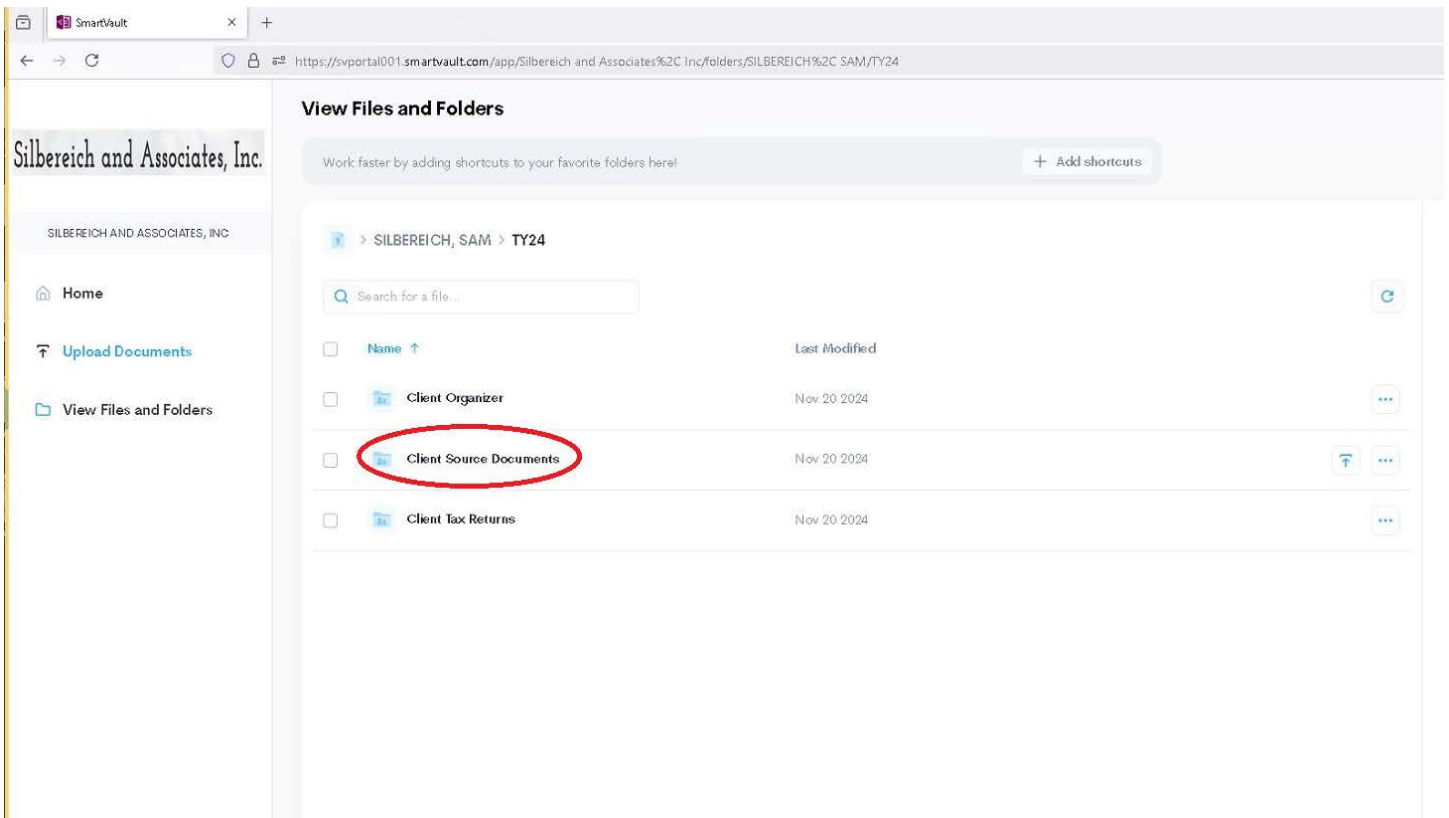
9. To DOWNLOAD your tax return, please click on the “Client Tax Returns” icon link. If your tax return is done, you will find it in this folder.



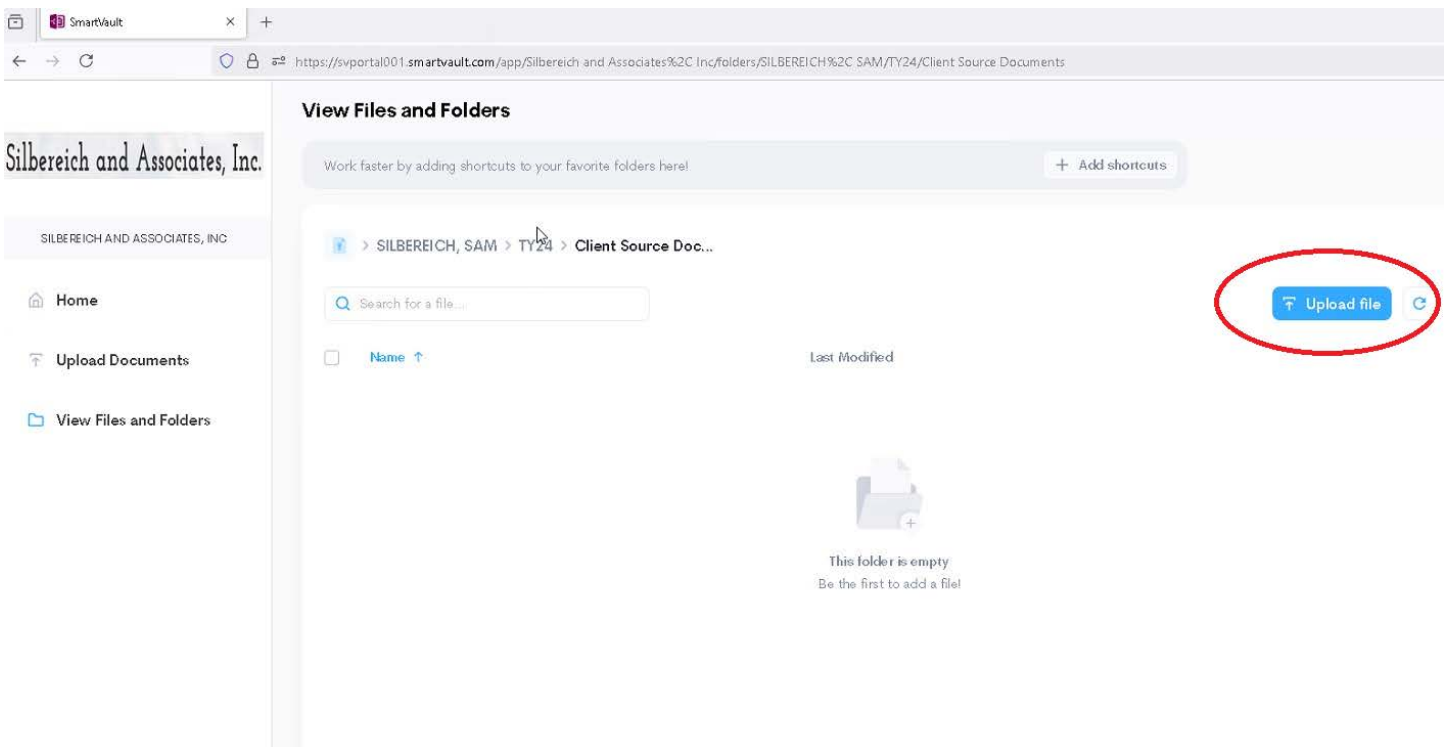
10. Once the folder is opened, you will have the option to download the copy of your tax return and the IRS e-file acceptance letter.



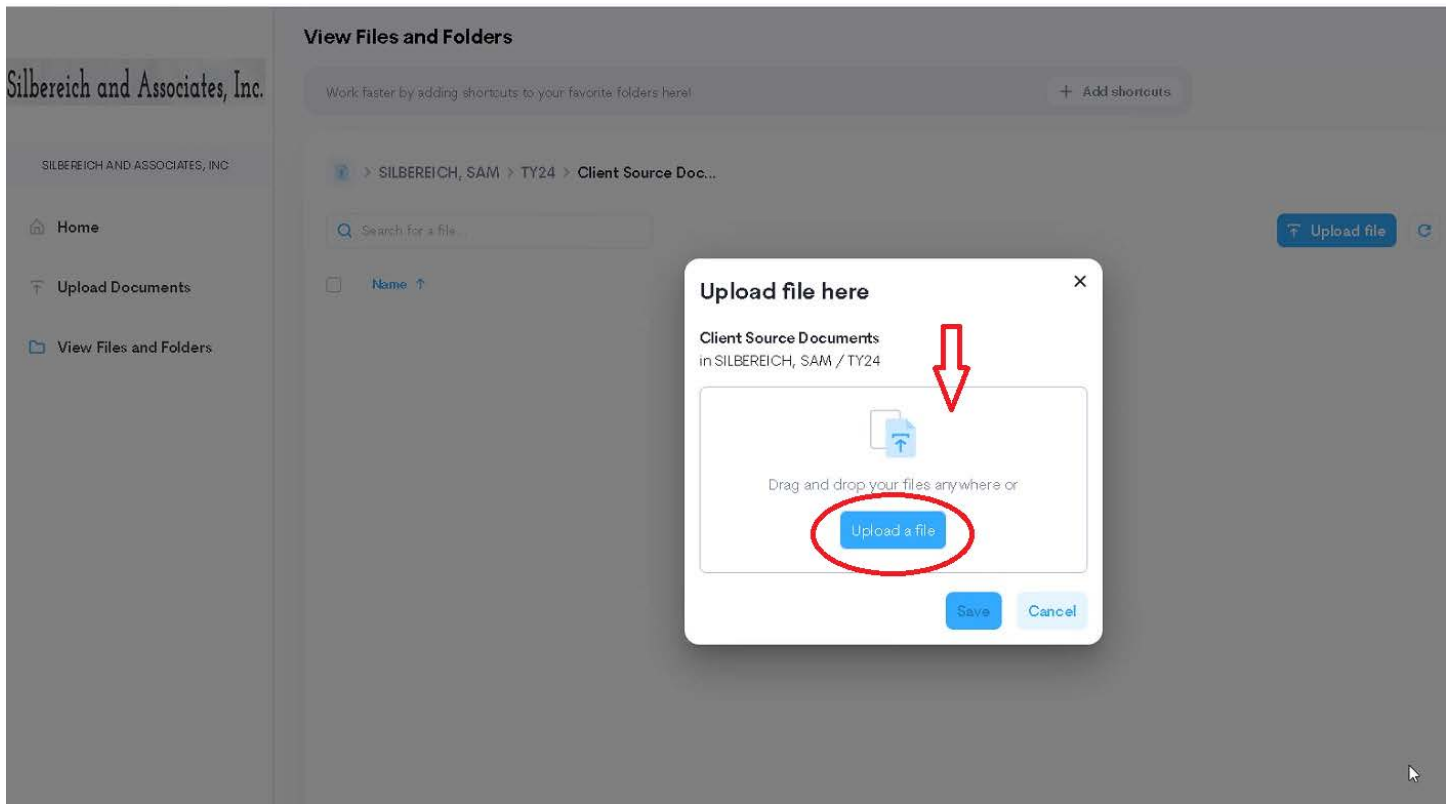
11.To UPLOAD your documents, please click on the Client Source Document icon link.



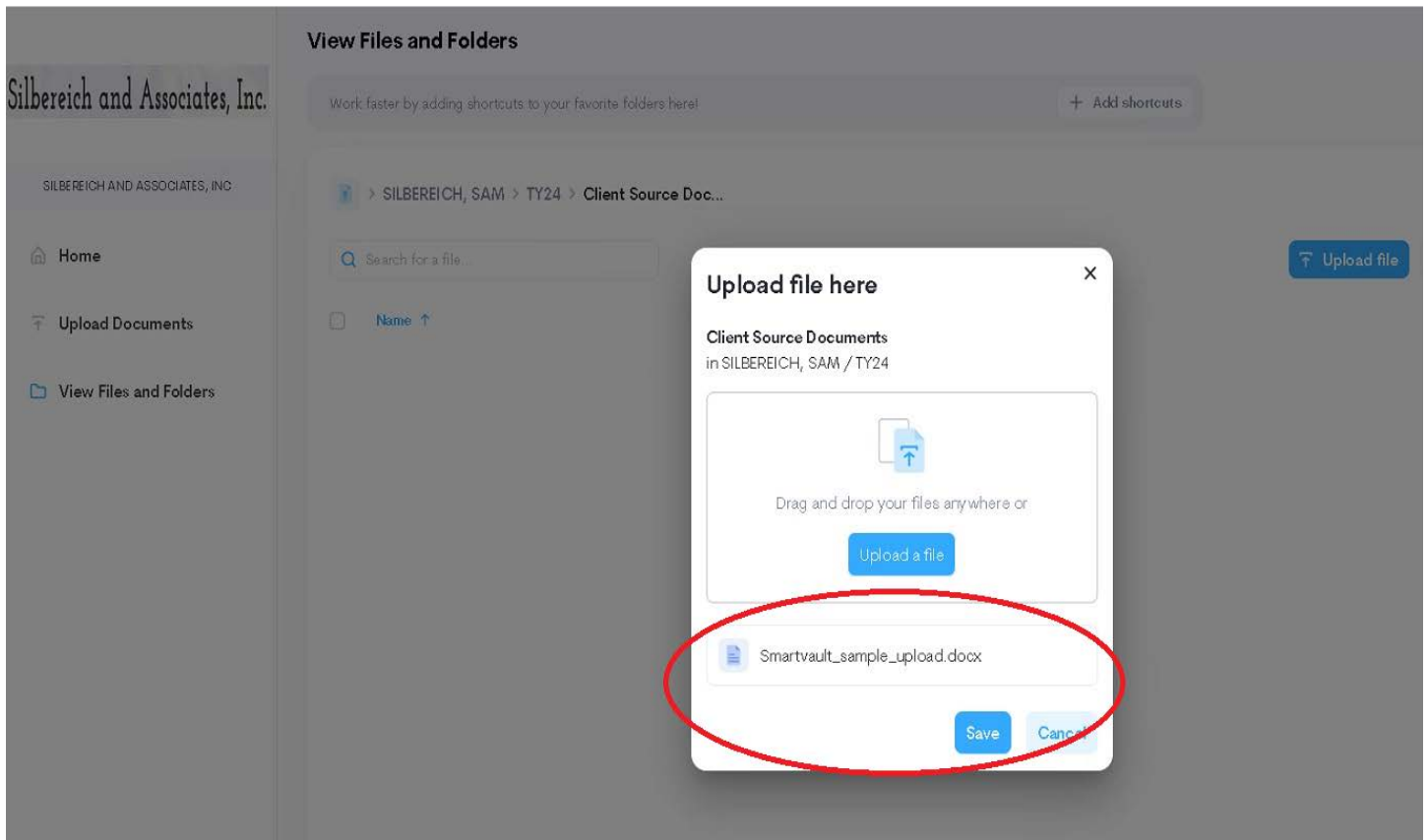
12.Once the page is loaded, click on the blue 'Upload file" button on the right side.



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.

