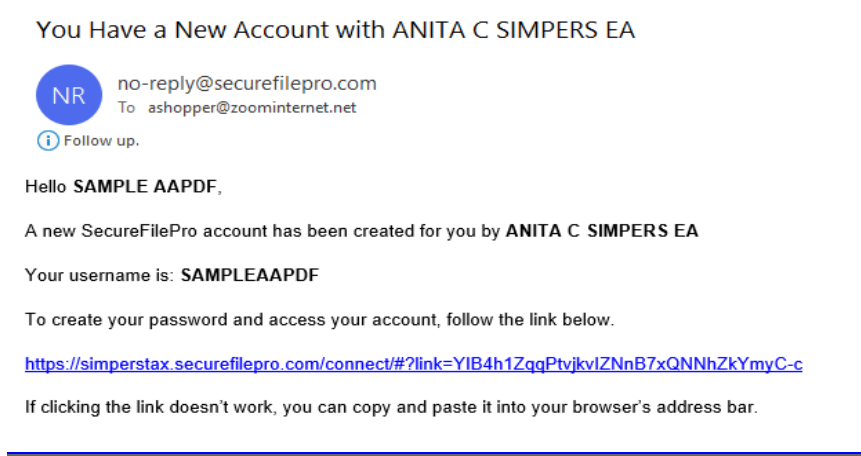


How to create and use SecureFilePro Portal

1st Send an email to taxbiz@zoominternet.net with **SFP request** in subject line.

You will receive the following email (with your name) from **no-reply @ securefilepro.com**:



2nd Click on the link provided to gain access to the portal.

3rd The Portal will ask you to enter the **last four digits of the SSN or EIN**. (Note: if you are filing a joint tax return, use the last 4 digits of the SSN that belong to the taxpayer name listed first on the tax return.)

4th Create a password for your account. The password must contain an upper case letter, a lower case letter, a number, and a special character (such as !, #, \$, etc.). Please note- we DO NOT have access to your passwords.

Create Password for
SAMPLEAAPDF

Last 4 of SSN *

Minimum 8 Characters

Password *

Confirm Password *

5th Click the Submit button. The Sign In screen displays.

Login

Username
SAMPLEAAPDF

Password

[Forgot UserName/Password](#)

[Terms of Use](#)

[Privacy Policy](#)

You have successfully created your SFP account 😊

To upload documents to us: Click on TO PREPARER, ADD FOLDER. Label Folder the Tax year and upload all your documents to one file. If you later need to add additional documents, follow the same steps, but change the label.

The screenshot shows a web interface with three distinct sections, each with a blue header bar. The top section is labeled "From Preparer" and contains a large, empty white rectangular area. The middle section is labeled "To Preparer" and contains a blue button with a folder icon and the text "Add Folder". Below this button is another large, empty white rectangular area. At the bottom right of this section is a blue button with a cloud icon and the text "Upload". The bottom section is labeled "Public Folder" and contains a large, empty white rectangular area.

To open documents uploaded by the preparer (me): Click on the files in FROM PREPARER, after logging in to the portal with the password you created and have been using.

Once you are in the portal the files are in "documents from preparer".

The files are protected with a password my software determines. It is the first 4 letters of your (primary taxpayer's) last name (all lower case) and the last **FIVE (5)** digits of your (primary taxpayer's) ssn.