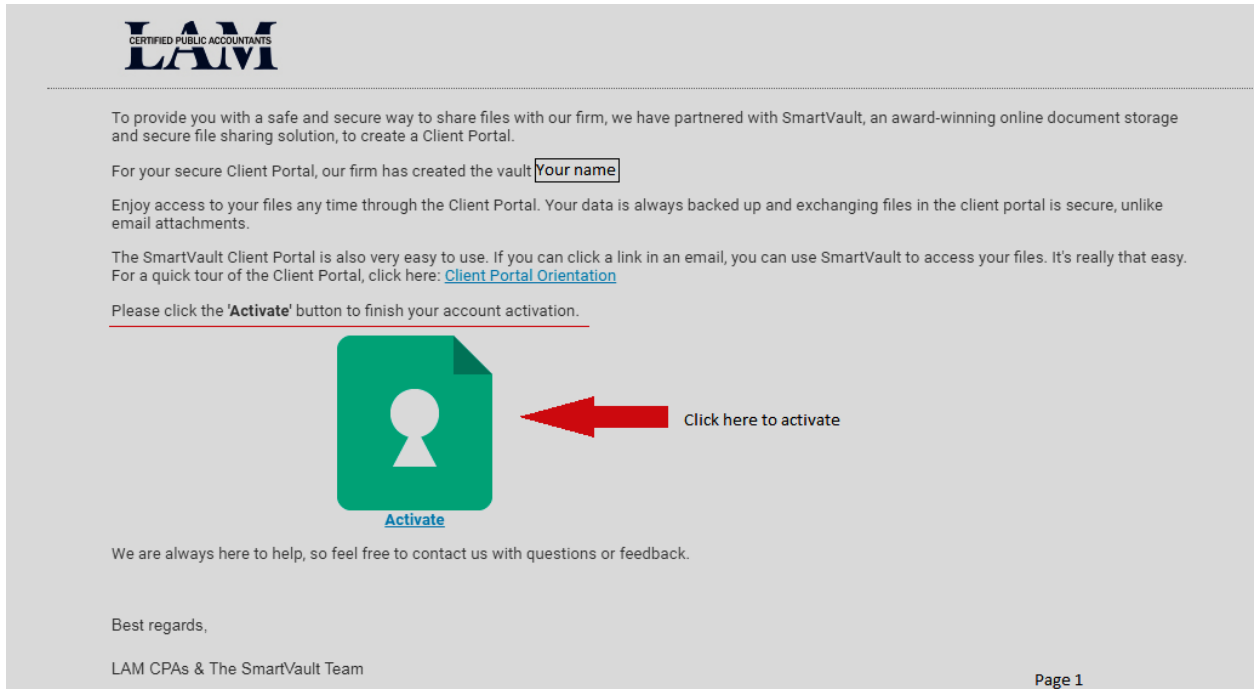


SmartVault Client Instructions

- ❖ If you want access to SmartVault to upload tax documents or access prior tax returns, please contact us to set up a SmartVault account.
- ❖ Once we set up your account or “Vault”, you will receive an email invitation to activate it. Just click on the “Activate” icon to begin!



The screenshot shows an email from LAM CPAs. The header includes the LAM logo and the text "CERTIFIED PUBLIC ACCOUNTANTS". The main body of the email explains that a Client Portal has been created for the user, with the vault name set to "[Your name]". It provides instructions on how to access the portal and includes a link for "Client Portal Orientation". A red arrow points to a green "Activate" button, with the text "Click here to activate" next to it. The email concludes with a sign-off and the name of the team.

LAM
CERTIFIED PUBLIC ACCOUNTANTS


To provide you with a safe and secure way to share files with our firm, we have partnered with SmartVault, an award-winning online document storage and secure file sharing solution, to create a Client Portal.

For your secure Client Portal, our firm has created the vault **[Your name]**

Enjoy access to your files any time through the Client Portal. Your data is always backed up and exchanging files in the client portal is secure, unlike email attachments.

The SmartVault Client Portal is also very easy to use. If you can click a link in an email, you can use SmartVault to access your files. It's really that easy. For a quick tour of the Client Portal, click here: [Client Portal Orientation](#)

Please click the 'Activate' button to finish your account activation.

 **Activate**

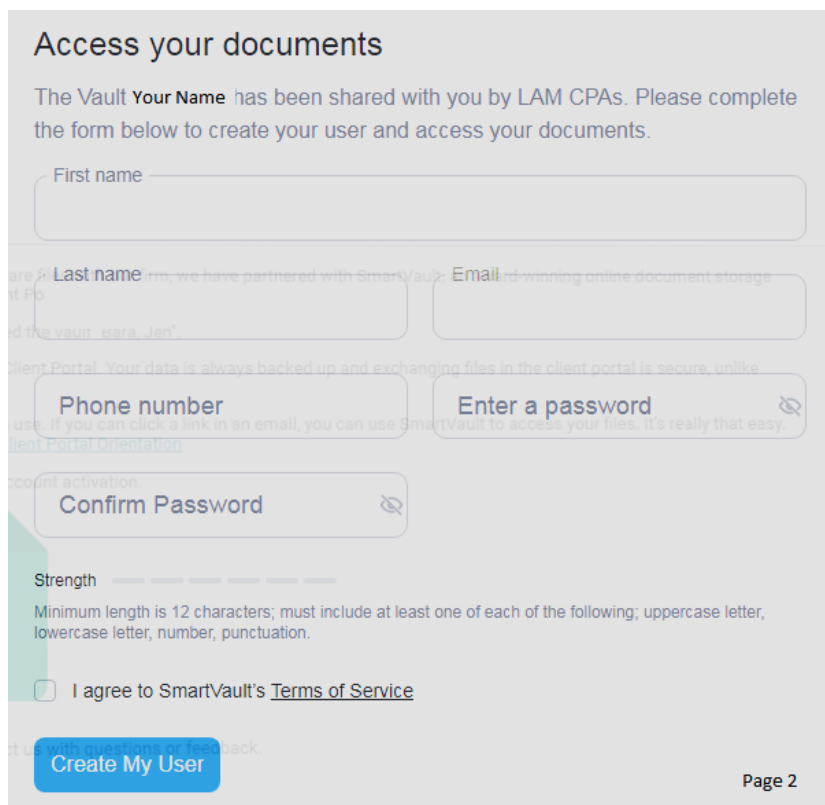
Click here to activate

We are always here to help, so feel free to contact us with questions or feedback.

Best regards,
LAM CPAs & The SmartVault Team

Page 1

- ❖ Complete the form to create your username and password:



The screenshot shows a form titled "Access your documents". The form asks for the user's first and last name, email address, phone number, and a password. The password field includes a strength indicator and a list of requirements: minimum length of 12 characters, and inclusion of at least one uppercase letter, lowercase letter, number, and punctuation. There is a checkbox for agreeing to the terms of service and a "Create My User" button.

Access your documents

The Vault **Your Name** has been shared with you by LAM CPAs. Please complete the form below to create your user and access your documents.

First name

Last name

Email

Phone number

Enter a password

Confirm Password

Strength

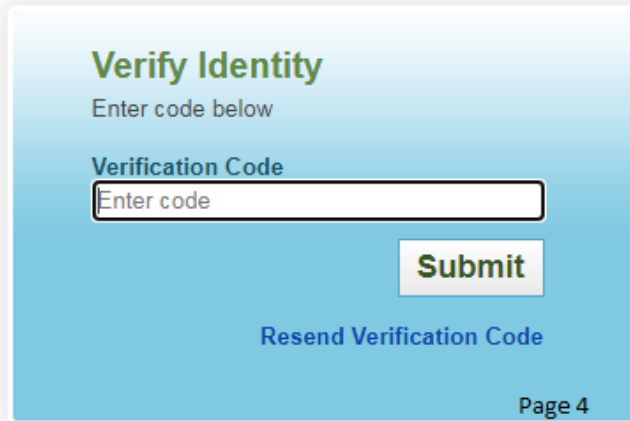
Minimum length is 12 characters; must include at least one of each of the following; uppercase letter, lowercase letter, number, punctuation.

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

Page 2

- ❖ Sign in to your account. A verification code will be sent to your email. You will need to check your email and enter the code.

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



Verify Identity
Enter code below

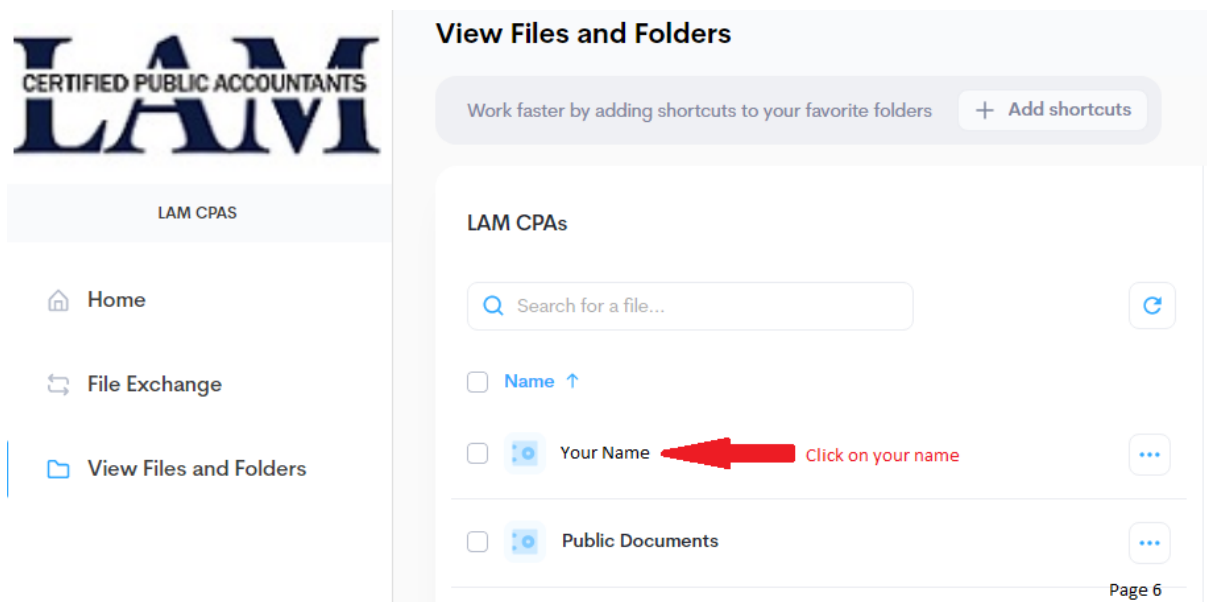
Verification Code

Submit

[Resend Verification Code](#)

Page 4

- ❖ Once you've signed in, you should be on the SmartVault homepage. You can upload documents through the "File Exchange" or by going to "View Files and Folders". Click on "View Files and Folders" on the left side of your screen.
- ❖ Now you should be able to see your name listed:



LAM
CERTIFIED PUBLIC ACCOUNTANTS
LAMI

LAM CPAS



- Home
- File Exchange
- View Files and Folders**

View Files and Folders

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

LAM CPAs

 [Refresh](#)

- [Name ↑](#)
-  **Your Name** [Click on your name](#) [More](#)
-  **Public Documents** [More](#)

Page 6

- ❖ Click on your name to take you to the next screen.
- ❖ Under your name should be available tax years for you to view. Click the year you would like to view or upload tax documents.

LAM
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LAM CPAS

Home

File Exchange

View Files and Folders

View Files and Folders

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

> Your Name

Search for a file...

Name ↑

TY20

TY21

Select tax year you want to view or upload documents

Page 7

- ❖ If you just want to view your tax return, select “Tax Returns”. To upload new documents, select “Source Documents”. Do NOT upload new documents to the “Tax Returns” file!

LAM
CERTIFIED PUBLIC ACCOUNTANTS

LAM CPAS

Home

File Exchange

View Files and Folders

View Files and Folders

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

Name

> Your name > TY20

Search for a file...

Name ↑

Source Documents

Tax Returns

Click to upload NEW tax documents

Click to view tax return

Page 8

- ❖ On the next screen, click on the “Upload file” button on the right side.

- Home
- File Exchange
- View Files and Folders

View Files and Folders

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

Name > TY20 > Source Documents

Search for a file...

Name ↑



Click here to upload files



Upload file

❖ Follow the instructions to upload your documents!

Upload file here

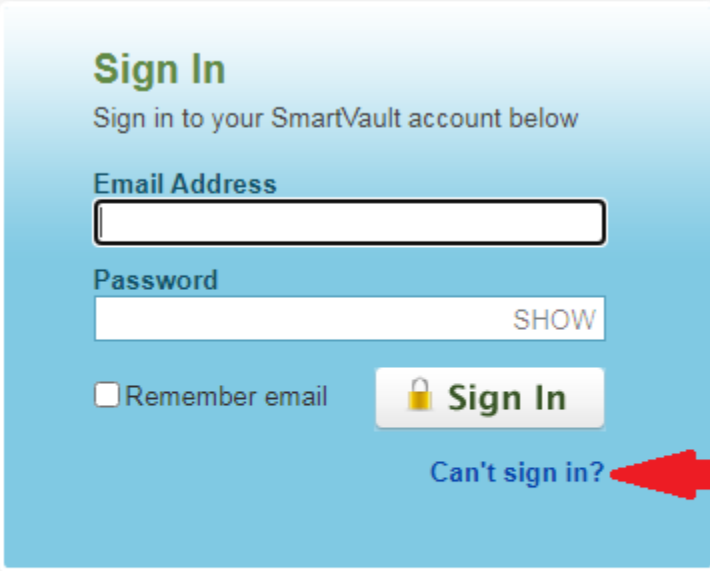
Source Documents
in Your name / TYxx

Drag & drop from your computer or click in the box to bring up your documents

Drag and drop your files anywhere or

Save Cancel

- ❖ If you forget your password...click "Can't sign in" and follow the instructions.




Sign In
Sign in to your SmartVault account below

Email Address

Password
 SHOW

Remember email

 **Sign In**

[Can't sign in?](#)

Forgot Password?

Click here if you forgot your password

The image shows a 'Sign In' form for SmartVault. It includes fields for 'Email Address' and 'Password', a 'Remember email' checkbox, and a 'Sign In' button with a lock icon. A red arrow points to the 'Can't sign in?' link, and another red arrow points to the 'Forgot Password?' link. The text 'Click here if you forgot your password' is positioned to the right of the 'Can't sign in?' link.