

SECURE DOCUMENT EXCHANGE FACTS

This is an overview of everything regarding secure document exchange. We recommend storing this document in an accessible location on your computer, so you may refer to it at any time. The transmissions to and from storage in both the email exchange and the client portal are encrypted using military-grade encryption. The files are also encrypted while in storage at the datacenter. The datacenters are SSAE 16 accredited, and use all the highest grade security, including hurricane-rated roofs and multiple redundant power sources.

Email Exchange:

Most of you have used our current system, ShareFile. There is an extra layer of security added as you must have a password to access the docs when you click on the link to retrieve them.

If you are using the system for the first time you will also receive a separate email explaining that a user account has been set up with your email address, and how to access it. You may need to look in your spam folder for this second email. It will come from me as the sender, but the email address will be mail@sf-notifications.com. You will be taken to a screen to create your own password. This will be a one-time event. Your user name will be your email address. Once you are in the system, you are a user. You can retrieve documents with this password from then on. If you forget the password, there will be a link to request a new one when you login. If you have already made a password here, it will also work in your portal (see below). Whichever place you setup your password in first, it will work in either email exchange or portal.

If you want to upload a document, please use the “send me secure documents” link below my email signature, and transmit the document to us. This is for your own protection. I cannot force you to do this. All I can do is provide advice which helps to protect your identity. If you cannot find an email from me with the link to send me a document, here it is:

<https://philtax.sharefile.com/r/rc4fe4aa470444338>

Portals:

Some of you have received emails saying I have setup a portal for you. In general, I will be setting them up for the folks with whom I have a lot of communication and exchange a lot of documents with over the course of the year. For others, I believe the email exchange referenced above will work best. If you do not receive a portal from me and wish to have one, I will gladly give you one. The advantage of the portal is that I can store electronic copies of your tax returns or other documents there securely for your retrieval at any time necessary. You could also upload documents to the portal securely at any time. You can also place large files like QuickBooks files in it for me to retrieve. When I set the portal up, you will receive a notification email which has a unique link for you to access your own portal. You will also be able to access it from the philtax website by clicking the “Client Portal” tab on top of every page. You can access it from any device at any time. Accessing the portal via the philtax website is the easiest way of arriving at your portal. When you click on “Client Portal,” you will be redirected from the philtax website to the ShareFile login screen for your portal.