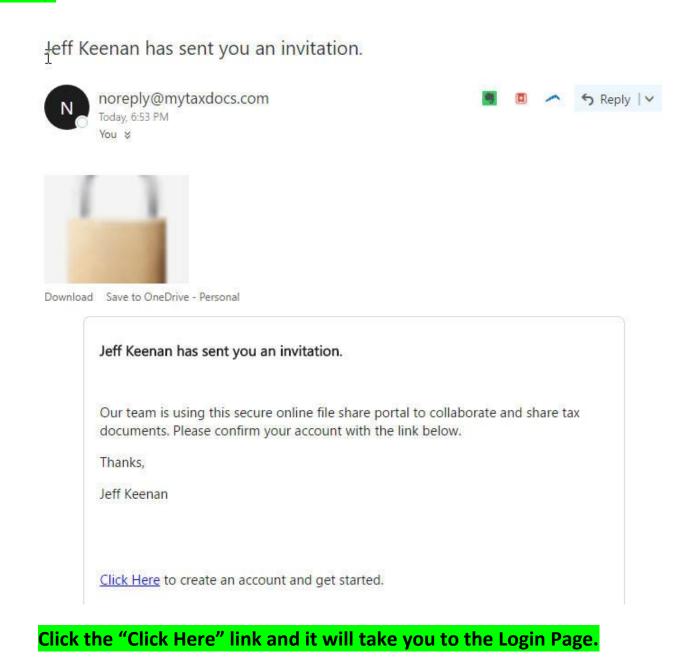
# **Introducing Client Xchange for Keenan Tax Service**

I think you will find the secure website to be user-friendly. I'm including a few screen shots for your reference.

You will receive a message like the following (check your spam/junk folder):





#### LET'S GET STARTED



Easily & securely exchange tax information with your tax professional. Complete the form on the right to activate your account & get started.

First Name	Last Name
jkeenan68@hot	mail.com
Personal Account	Login
Username	
Password	Confirm Password
	iet Started >

# LOGIN

At the Login Page, create a Username and Password and Agree to the Terms. Then click "Get Started". This will take you to the File Cabinet which will look like this:

		FILE CABINET	SORT FILES: ALPHA	CH FILES
	Home			R ADD FILE
FILES AND FOLDERS File Cabinet	Completed Return Files for Tax Preparation			

Login

## UPLOAD DOCUMENTS

The File Cabinet is where you can upload documents to the folder "Files for Tax Preparation". To upload files, click on "Files for Tax Preparation". This will open the folder. You can then add files by clicking "Add File" in the upper right corner of the screen. You can upload any file type: PDF, Word document, Photo, Spreadsheet, etc.

When I complete your tax return, a copy of it, along with any instructions, will be in the "Completed Return" folder. You will get an email when the file is added to this folder.

## NAVIGATION

The "Navigation" feature (on the left side of the page) allows you to:

- Select Files and Folders.
- Update your profile. This will allow you to update your password or even upload a photo.
- See the Activity.

You might want to bookmark the website (make it as a favorite). The link is also available on my website at <u>www.keenantax.com</u> under the page "Send and Receive Your Tax Documents".