

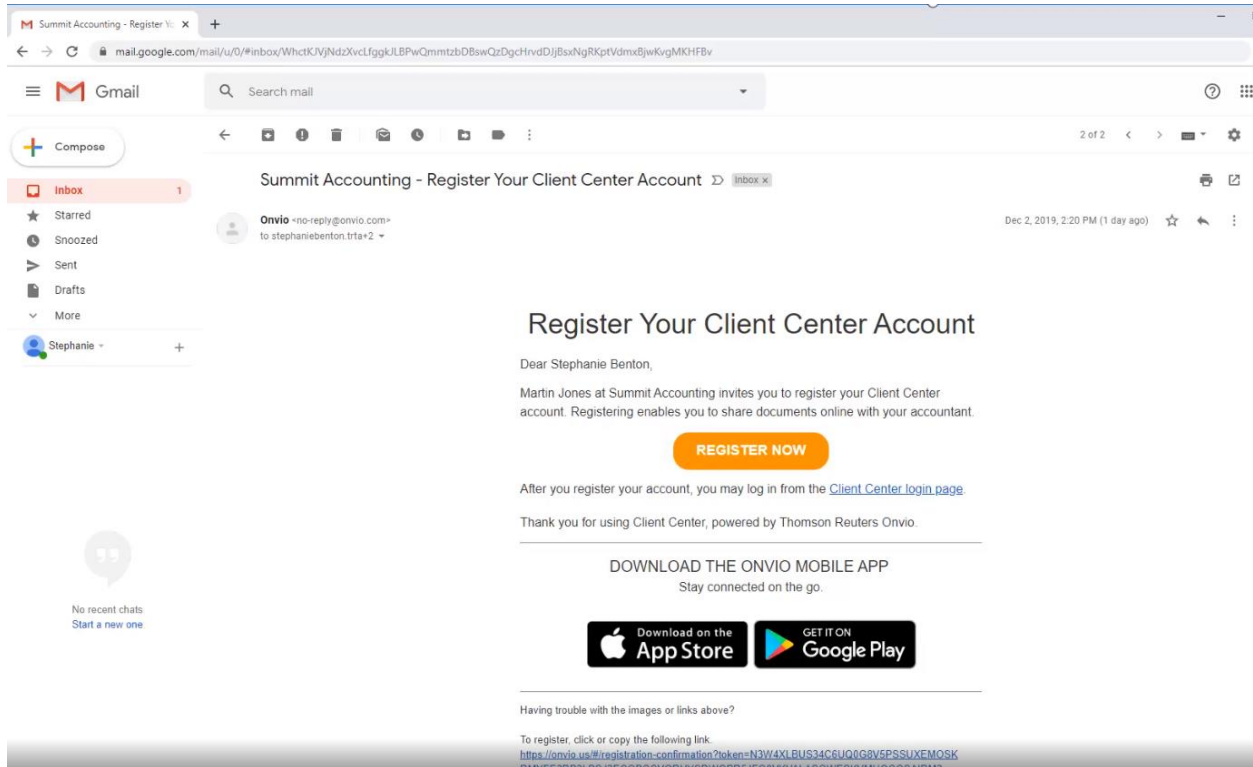
Forrest A. Eaton, Jr., CPA

New Client Center Instructions

How to register and use our new client portal called: Client Center

This is a secure and convenient way for us to share information with you and you with us. This document will show you how to register, access and navigate your new portal.

Once we set up your portal for you, you will receive an invitation email to register your Client Center account.



Once you click the orange button to Register, you'll be taken to the Client Center registration page.

Summit Accounting - Register Yo x Onvio x +

onvio.us/#/registration?token=N3W4XLBUS34C6UQ0G8V5PSSUXEMOSKRMYFE3RB2LBSJ3ECOBCCVQRUYSDWGPR5JFQ8VKVALASOWESKVMHQQCSAIRM2DERWQTF5F

Register Your Account

Account Information

First Name *

Last Name *

Email (Thomson Reuters ID)
stephaniebenton.trta+2@gmail.com

Create Password

New Password * [Show typing](#)

Confirm Password *

* Required Field

Password Requirements

Your password **must** have at least 8 characters and 4 of the following:

- At least 1 number (0-9)
- At least 1 lowercase letter (a-z)
- At least 1 uppercase letter (A-Z)
- At least 1 special character (punctuation): ` ~ ! @ # \$ % ^ & * () _ - + = { } [] \ | : ; " ' , . - ? /

Your password should **not** use:

- words from the dictionary
- your user ID
- sequential letters or numbers such as "abc" or "123"

REGISTER ME

Fill in your name and create your password. Please save this information in a safe place; a secure password manager is recommended (such as [LastPass](#)).

Success! You're Done.

Account Information

You've successfully registered your account.

Name
Stephanie Benton

Email Address (Thomson Reuters ID)
stephaniebenton.trta+2@gmail.com

[Privacy policy](#)

Our site uses cookies to improve your online experience. They were placed on your computer when you accessed this website. You can change your cookie settings through your browser. [Cookie policy](#)

Want more security for your account?

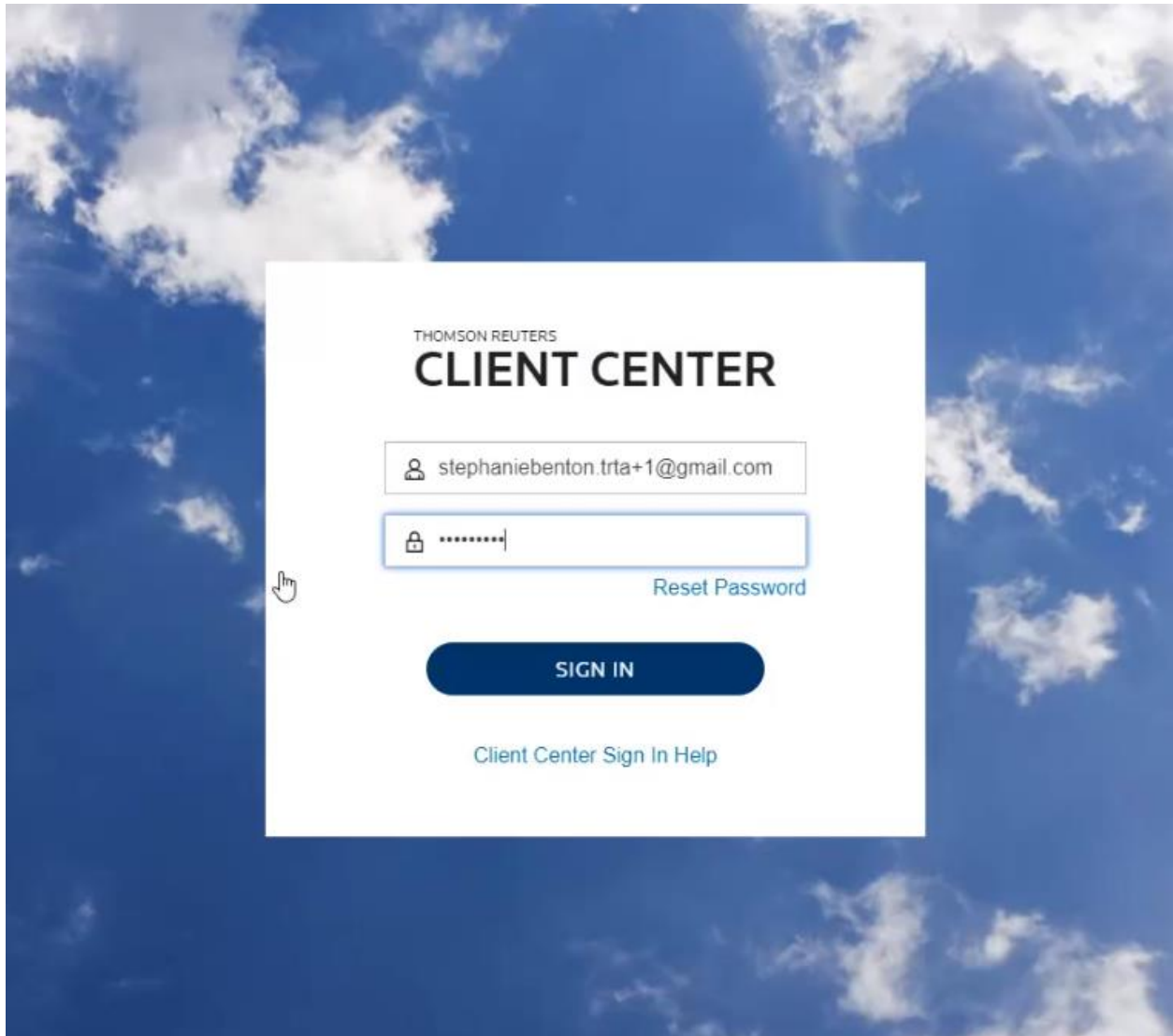
Passwords are not as safe as you think they are. Download the Thomson Reuters' Authenticator app to your smartphone and add multi-factor authentication to increase the security of your account and require approval of each sign-in attempt from your smartphone. If your firm requires multi-factor authentication, you'll set it up the first time you sign in. If multi-factor authentication is not required, you can enable it by updating your profile after you sign in.

DONE

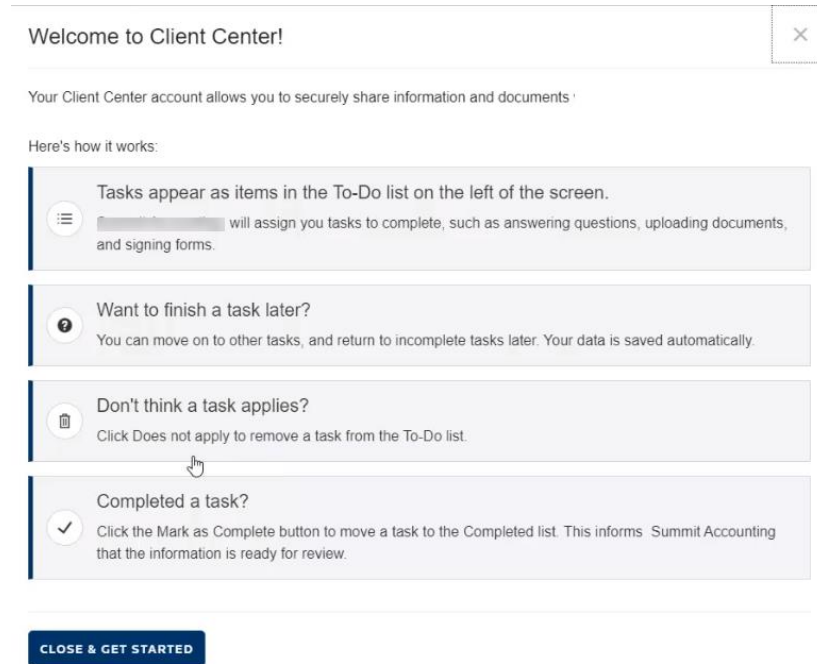
Your account is all set!

You should then be taken to the login page. Alternatively, you can then access your Client Center login anytime from our website here:

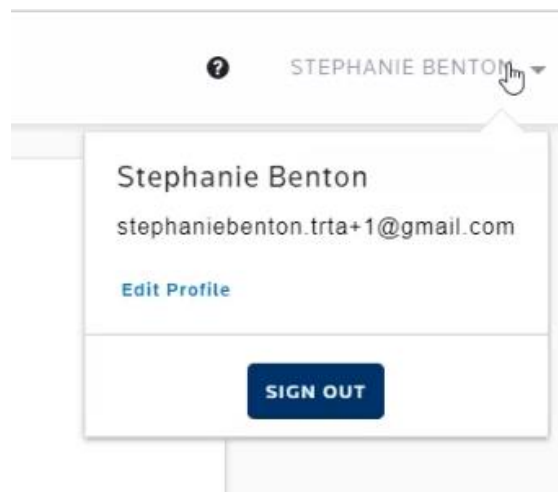
<https://www.clergytaxhelp.com/client-login>



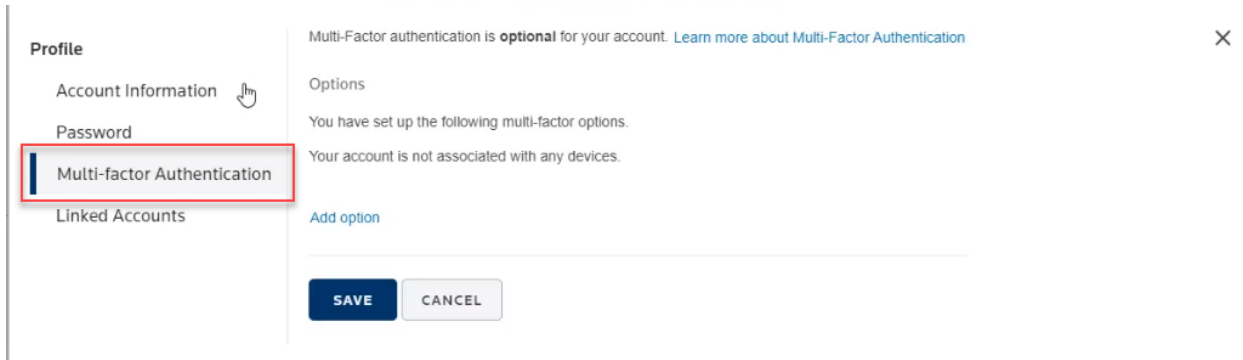
When you log in for the first time, you will get the Welcome message to walk you through the different ways you can use your client portal.



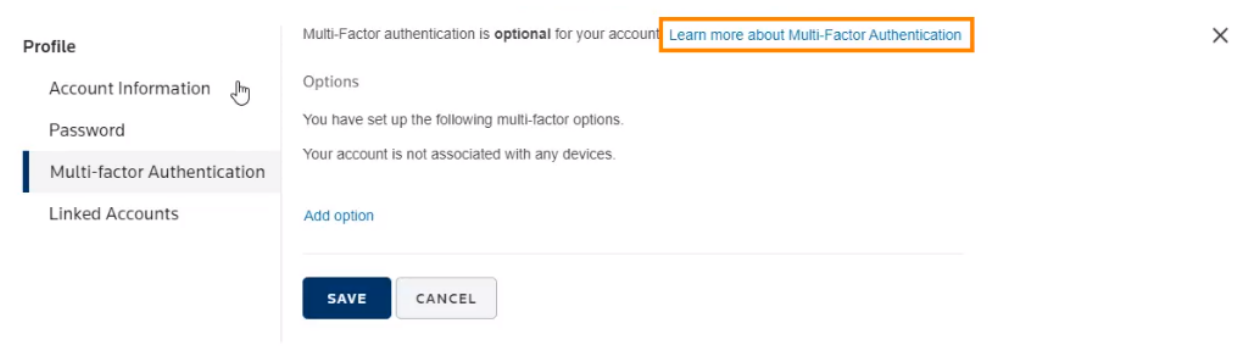
After you review this pop-up message, you can update your name, email address or password by clicking on your profile at the top right of your screen.



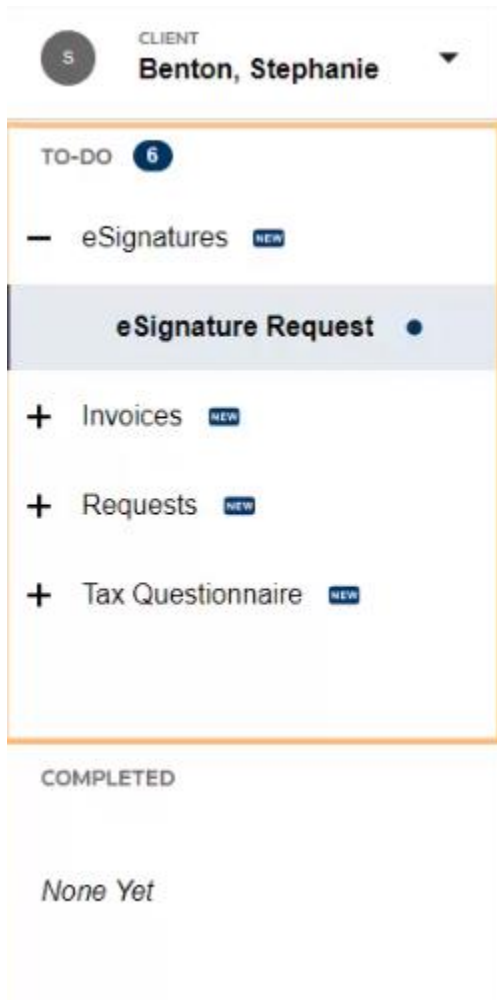
You can also turn on multi-factor authentication (MFA) to improve the security of your account, which is recommended.



To learn more about what multi-factor authentication is and why you should consider using it, click on the link at the top of the screen.

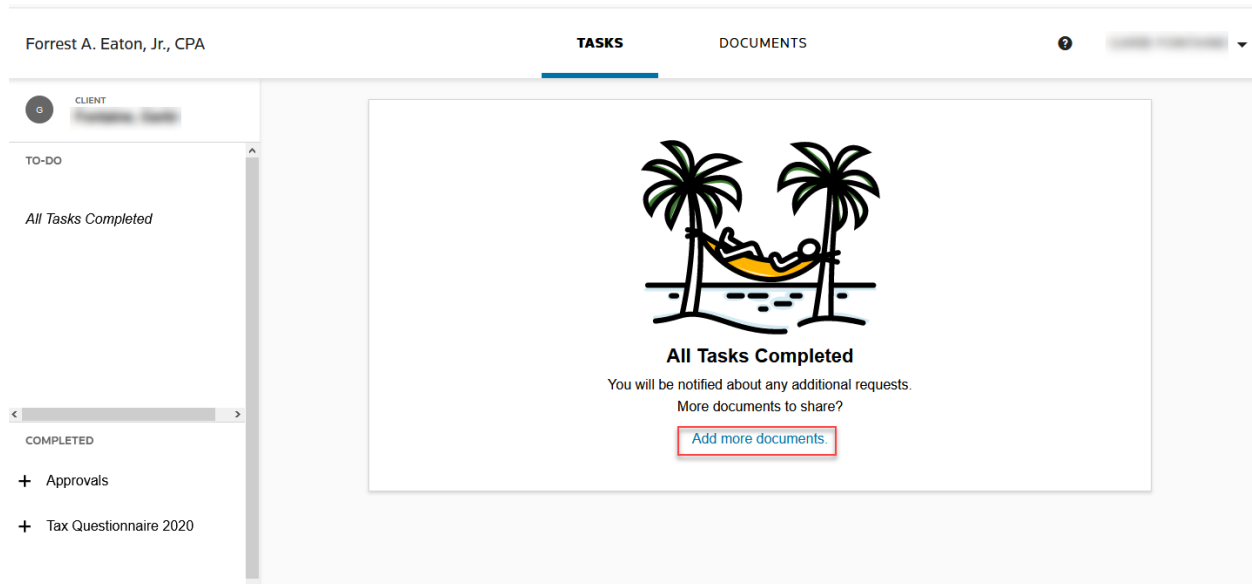


You will find any To Do items on the left side of your home screen.



You may receive requests for information, your Tax Questionnaire, or documents for eSignature, and more. Once you have completed all tasks, you will see them moved to the Completed list on the left side.

You can also upload any documents or information you want to share with us as well.



If you would like to watch a more detailed video on other features of your Client Center account, [Click Here to Watch a Video](#) (3 mins)

If you have any questions or need assistance, please don't hesitate to contact us!

(774) 237-9193 or via our website:

<https://www.clergytaxhelp.com/contact>