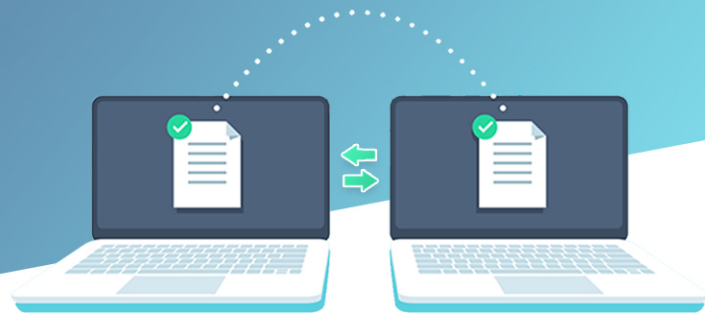


ALLOY SILVERSTEIN'S

Client Portal



Securely send documents to your accountant.

To mitigate the risk for identity theft and fraud, Alloy Silverstein has a secure Client Portal to safely and quickly send and receive your sensitive documents.

Step One: Get Access

When you become a new client of Alloy Silverstein, you will be setup with your Client Portal login credentials. You can access the portal by bookmarking www.alloysilverstein.com/portal or visiting our website. For questions regarding portal setup, contact Donna Gerber at 856.667.4100 ext. 1133.

For an added layer of security, the portal utilizes two-factor authentication. If you would prefer to receive your authentication code over text, make sure we have your cell phone number on file.

Step Two: Gather Your Files

The portal is equipped to upload and host most file extensions, including PDFs, images, QuickBooks files, Microsoft Excel spreadsheets, and most financial software data files.

Here is how to prepare your files for portal upload:

- Download electronic versions of your statement(s)
- Scan printed copies of your document(s)
- Take a photo using your smartphone (*Tip: try to use good lighting and a steady hand so the text is as clear as possible.*)

Step Three: Get Notified

You will receive email notifications when documents are added to your portal and your CPA is automatically notified when you upload items for transfer. Data uploaded to the Client Portal is encrypted on a secure server and, for your protection, is automatically deleted after 30 days. You are free to access or download items as often as you would like within the 30-day period.

The most sensitive data you want to consider using the Client Portal for are:

- Current or past tax returns
- Financial statements
- Bank, broker, and credit card statements
- Copies or scans of checks
- Year-end source documents for tax season
- Anything with a social security number, financial account numbers, or other private data sought by identity thieves, such as birth dates, addresses, etc.

Think twice before sending sensitive information over email.

We strongly encourage you to use your Client Portal as much as possible when sending or collaborating on your non-public information.

