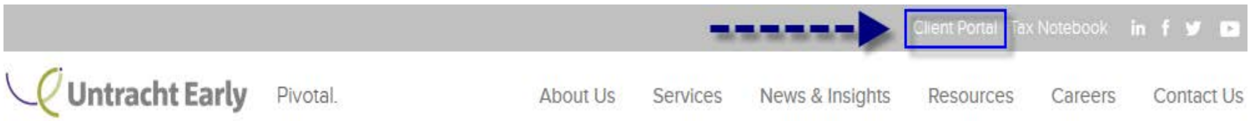
Untracht Early

Client Portal User Guide

1. **Access your client portal via http://www.untracht.com and click on the "Client Portal" tab.**



2. **You will be presented with a disclaimer (Acceptable Use Policy) which you must agree to if this is your 1st time accessing the portal.**

PLEASE READ THESE TERMS AND CONDITIONS OF USE CAREFULLY. THIS IS A LEGAL CONTRACT.

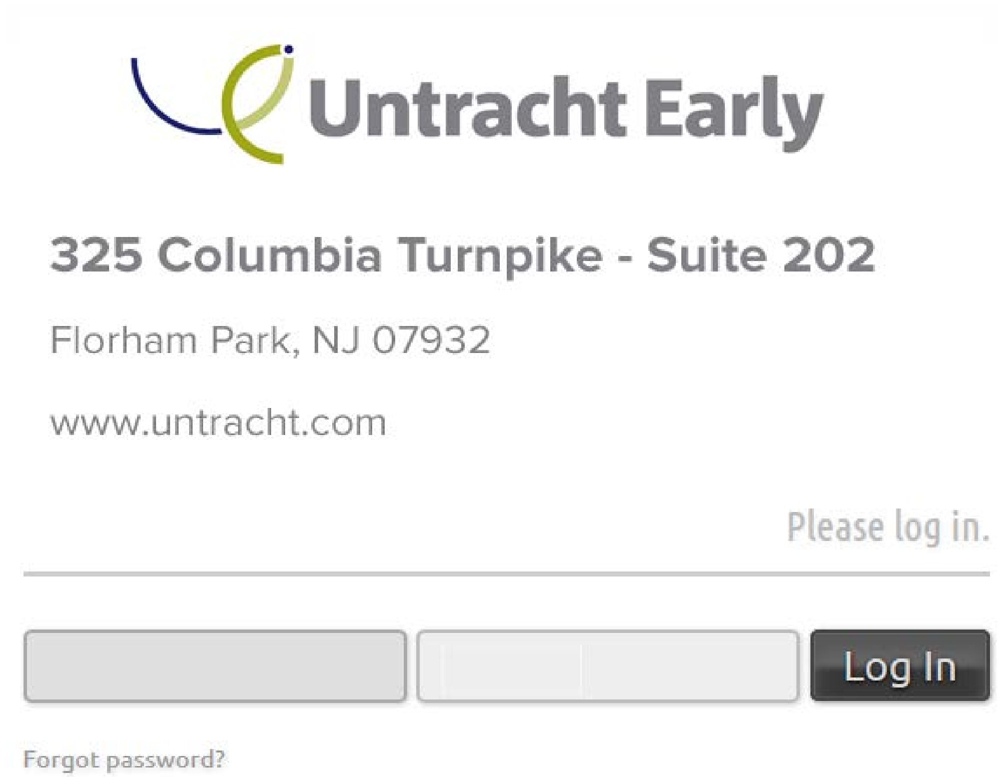
Acceptance of Terms of Use
The Untracht Early LLC (UE) client portal is offered to you on the condition of your acceptance of the terms, conditions, and notices contained herein. By using the portal you agree to these terms and conditions. If you are not a client or authorized employee of UE, any use by you of the portal is prohibited.

Description of Service
The portal provides UE's clients with access to information displayed on the portal for inquiries and deliveries of documents and communications for their account only. The information, documents, and communications on the portal are provided as a convenient resource to clients, their attorneys, agents, and other designated representatives (collectively, "Agents") and may be used for information purposes for their account. To the extent you wish to authorize any Agents to access your account, you must sign and return the Form of Authorization set forth below.

User Password and Security
Using the portal and its related services requires the use of a password and a user name. The confidentiality of your password and account is your responsibility. Any activities that occur under your account either by you or your Agents are you responsibility. You agree to notify us immediately of any unauthorized use of your account or any other breach of security. It is prohibited to use anyone else's account without the express permission of that user.

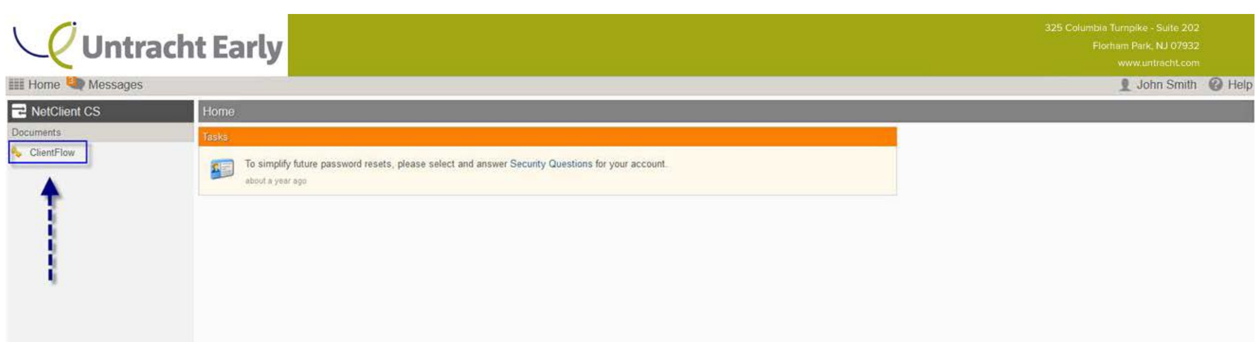
I Agree   Cancel

3. **Login to your personal client portal with the username and password which you created when you registered your account.**



Client Portal - (Home Page)

1. **Click on the "ClientFlow" icon on the left to view available entities.**

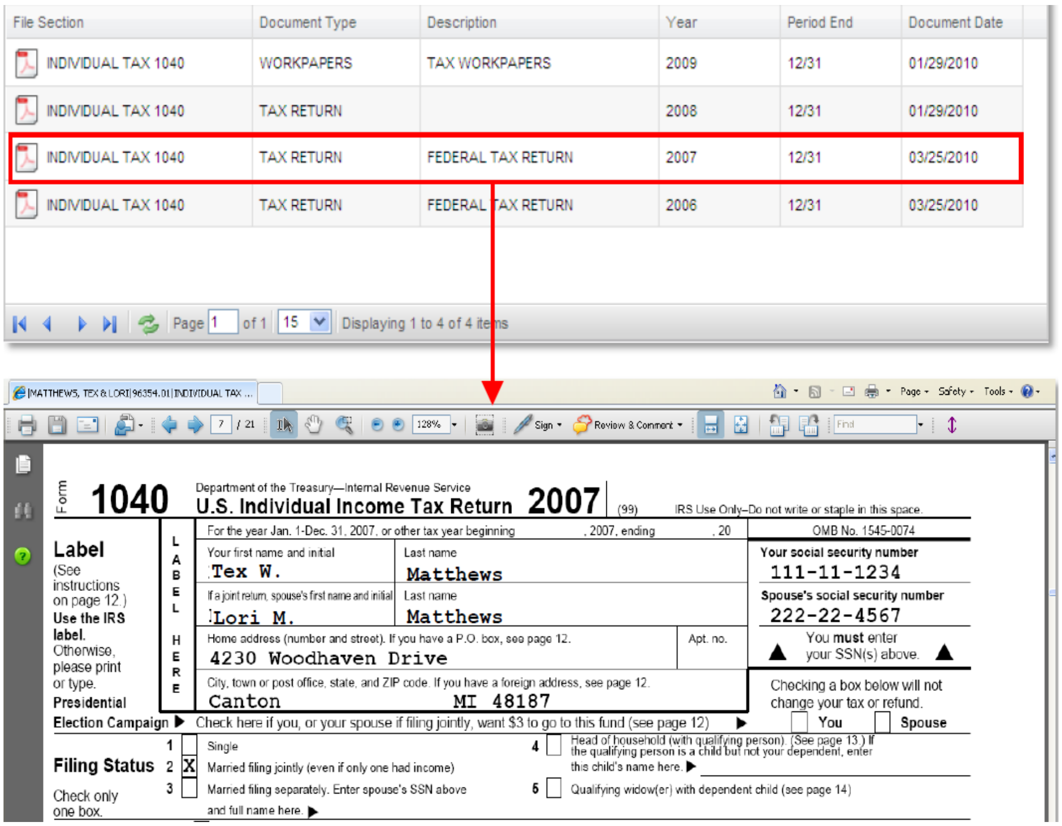


2. Folders presented within the client portal are entities which Untracht Early has granted you access to.

3. Clicking on a folder will allow you to view all documents underneath that entity which have been published for your review.

File Section	Document Type	Description	Year	Period End	Document Date
INDIVIDUAL TAX 1040	WORKPAPERS	TAX WORKPAPERS	2009	12/31	01/29/2010
INDIVIDUAL TAX 1040	TAX RETURN		2008	12/31	01/29/2010
INDIVIDUAL TAX 1040	TAX RETURN	FEDERAL TAX RETURN	2007	12/31	03/25/2010
INDIVIDUAL TAX 1040	TAX RETURN	FEDERAL TAX RETURN	2006	12/31	03/25/2010

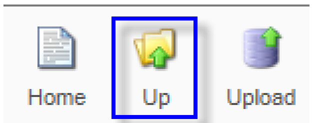
4. **Click on any document to open the document in (Read only) mode.**



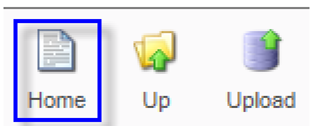
Note: All documents opened up within the "Client Portal" are (READ ONLY) and therefore cannot be edited and saved back to the portal. If a document requires editing or you wish to save a copy for yourself, please use the (File/Save As) feature and save it to your local drive.

The following software is required to view and open documents which are present in the portal (Microsoft Word, Excel, Outlook and Adobe Reader)

To return to a sub-directory of published documents, click on the "Up" icon.



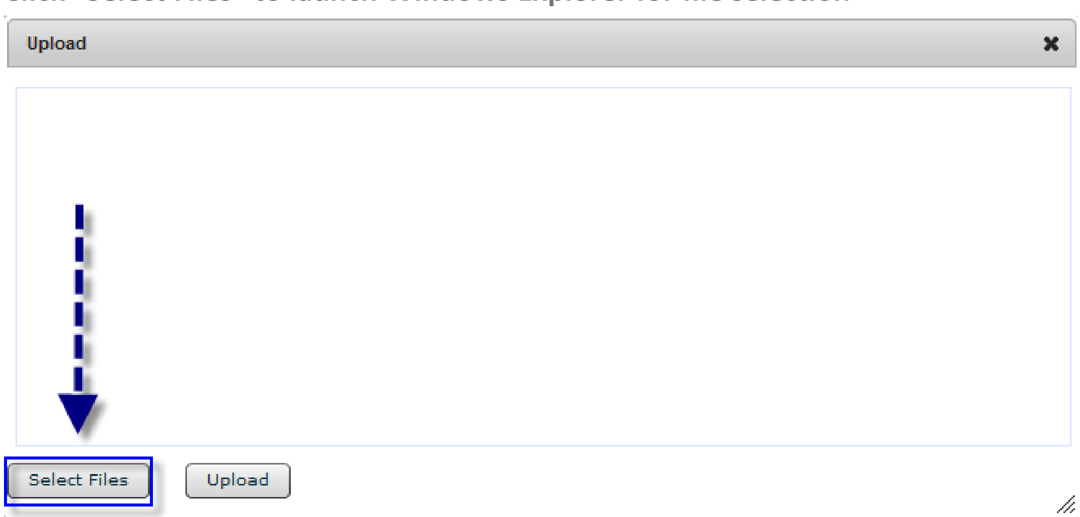
To return to the root directory of published documents, click on the "Home" icon.



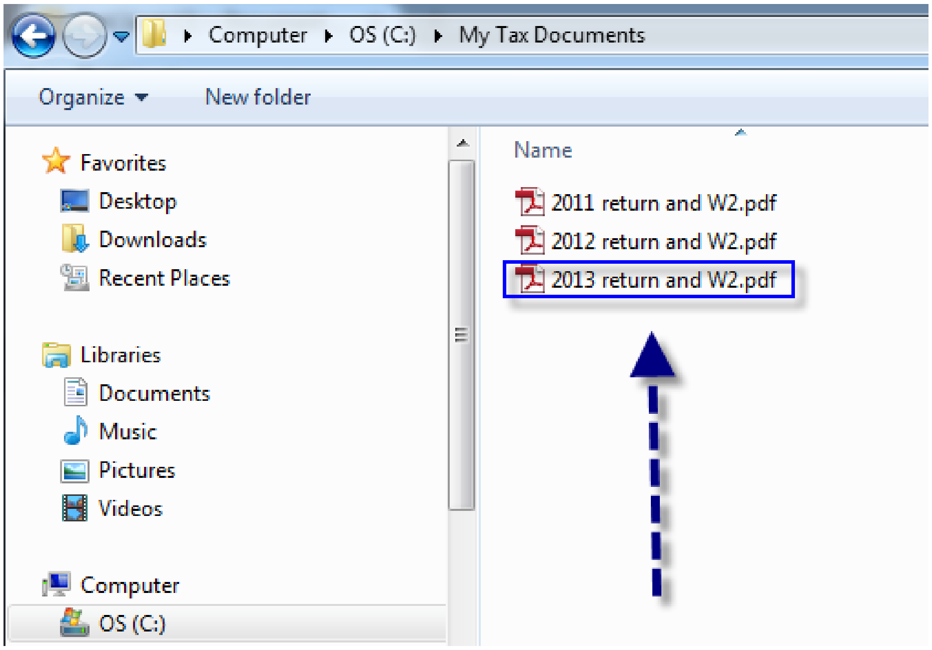
Uploading a Document

1. **To upload a document into "ClientFlow", click the "Upload" icon.**

2. **Click "Select Files" to launch Windows Explorer for file selection**

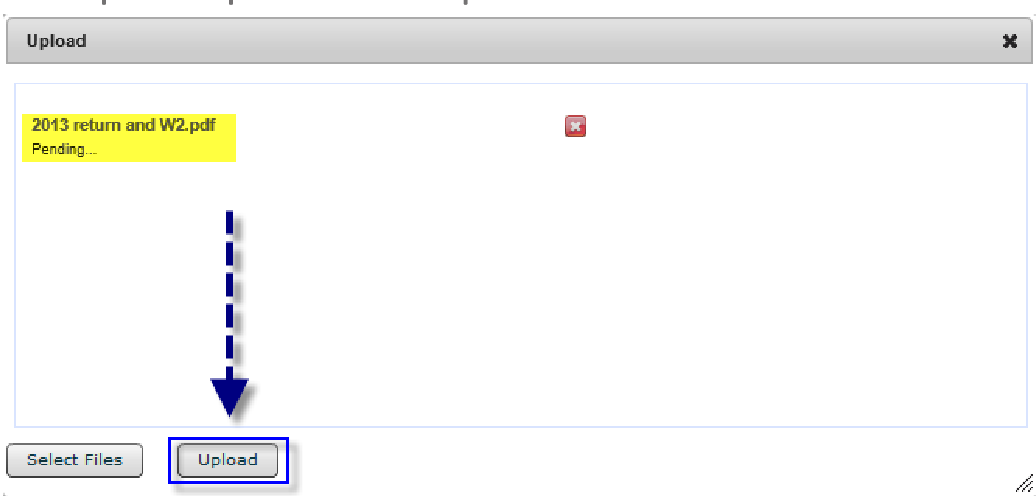


3. Click on the file you wish to upload to the "Client Portal" and click "Open"

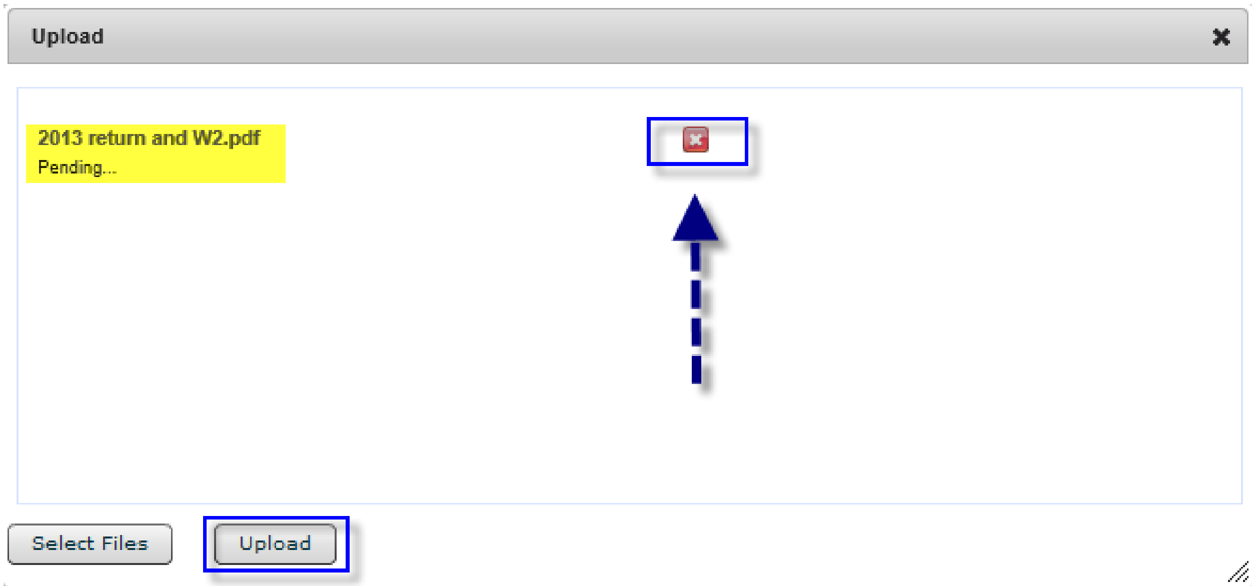


4. The selected document is now visible and waiting to be uploaded

5. To complete the process – Click "Upload"



6. If you have selected the wrong document for upload, simply click on the red X to cancel the process.



Note: Successfully uploaded documents should now be visible in your document management screen. You may need to refresh your screen to view the document. If the document is not present, the upload process may not have been successfully completed.

Please contact clientportal@untracht.com if you have difficulty uploading files.

Ending your session

After viewing or uploading documents, click on your name to sign out.

Note: You will be automatically redirected to the Untracht Early website upon exiting the client portal.