



Instructions for Using Our Secure Portal

Subject: You have a new Budd, Terry & Associates portal

A portal has been created for you by Budd, Terry & Associates. Your username is: YOURUSERNAME

To access your file(s), click the link below:

<https://gbuddcpa.securefilepro.com?link=larjc50txatxbo3io2w3r4m4crbqgzwd>

or copy and paste the link into the address bar of your browser. **THIS LINK WILL EXPIRE IN 5 DAYS.**

Once we know what email you would like to use, you will receive the following email from taxes@gbuddcpa.com and will include your username and customized link to active the portal.

Please click on your *individualized link* in the email **within 5 days** of receiving the email.

It will take you to a page that looks like this, asking you for the last 4 digits of your social security number and to create a password.

The password must contain an upper case letter, a lower case letter, a number, and a special character (such as !, #, \$, etc.).

Once you click submit, the next page will look like this – prompting you to sign in with your username (provided in the introductory email) and new password that you just created!

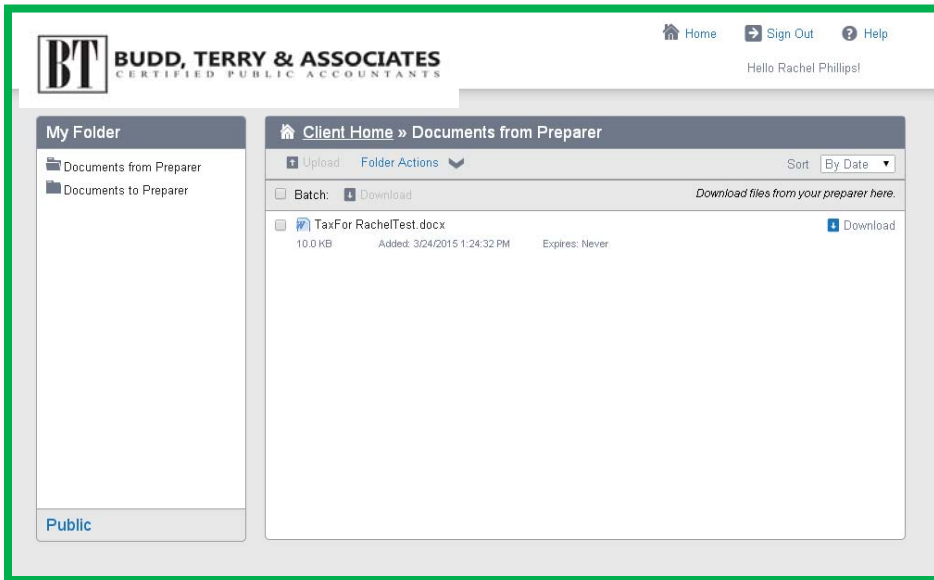
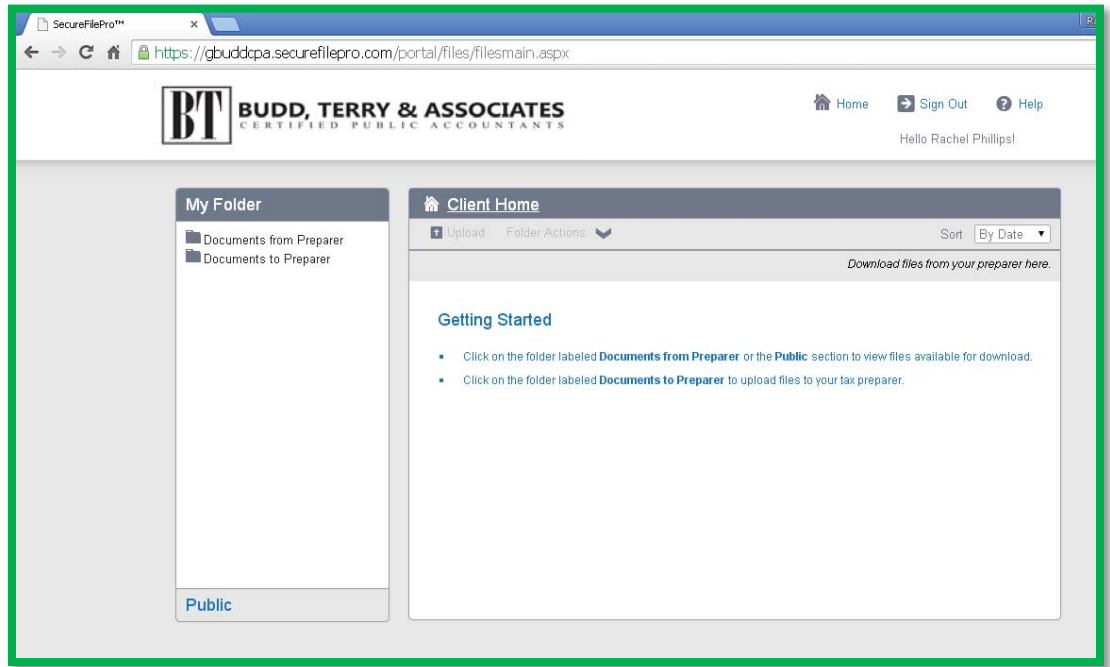
You can now access the portal & your tax documents anywhere, anytime. Using your new username & password at <https://gbuddcpa.securefilepro.com/>

Your new portal will look like this!

Any documents from Budd, Terry & Associates will be located in the **“Documents from Preparer”** folder.

If you would like to upload documents for Budd, Terry & Associates, you will add them to the **“Documents to Preparer”** folder.

When documents are uploaded to you from the preparer, you will also be sent an email notification. If you upload something for the preparer, we will be notified via email as well.



To take a document off of the portal from the preparer, go into the Documents from Preparer folder, and all available documents will be listed.

Select the one you would like to download by clicking on the **Download** link to the right. A dialog box will prompt you to select to open or save the file.

To upload a document for Budd, Terry & Associates - click the Documents to Preparer folder under the My Folder section.

prompt a File Upload Box allowing you to select files you'd like to upload. Once you have uploaded, we will be notified that something new has been uploaded.

Use the **“Upload”** link, which will then

