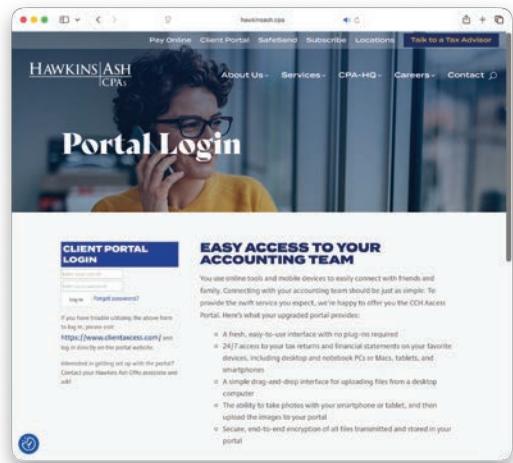


# Your Guide to the Hawkins Ash Client Portal



**A simple, secure way to share and receive documents—anytime, anywhere.**

## PORTAL HIGHLIGHTS & BEST PRACTICES

The Hawkins Ash Client Portal is a secure, convenient way to exchange documents and information with your service team. To help you get the most from the portal, we've put together these quick tips and best practices.

**1**

### Your Login Information

- Your **User ID** is your full email address.
- If you forget your password, you may reset it anytime using the **"Forgot Password"** link on the login page.

**Important:** Please do not request access codes more than once. Submitting multiple requests overrides earlier codes and may delay your access.

**2**

### Notifications & Email Settings

- Our team receives a notification each time you upload a document.
- You will receive an email notification when we publish documents to you.

To avoid missing important updates, please add **donotreply@cch.com** to your email safe sender list.

**3**

### Uploading Your Documents

For the fastest and most efficient processing, we recommend the following:

- **Upload files in groups** whenever possible, rather than one at a time.
- **Submit documents as PDFs** whenever you can.
- Free smartphone apps such as Adobe Scan can convert photos (JPEG, BMP, PNG, etc.) into PDFs.

Using PDFs helps streamline your upload process and reduces the time your tax professional spends organizing your information.

**4**

### Accepted File Types

- HEIC (iPhone photo) files are not supported.
- Please convert these files to PDF format before uploading.

**5**

### Getting Started with Portal Access

- If you need help setting up portal access, please contact your local Hawkins Ash office.
- Our team will be happy to assist you.

**WE'RE HERE TO HELP —** Using the Client Portal helps us serve you more efficiently and securely. If you have questions about uploading documents or accessing your account, your Hawkins Ash professional is always available to help. **Thank you for partnering with us.**