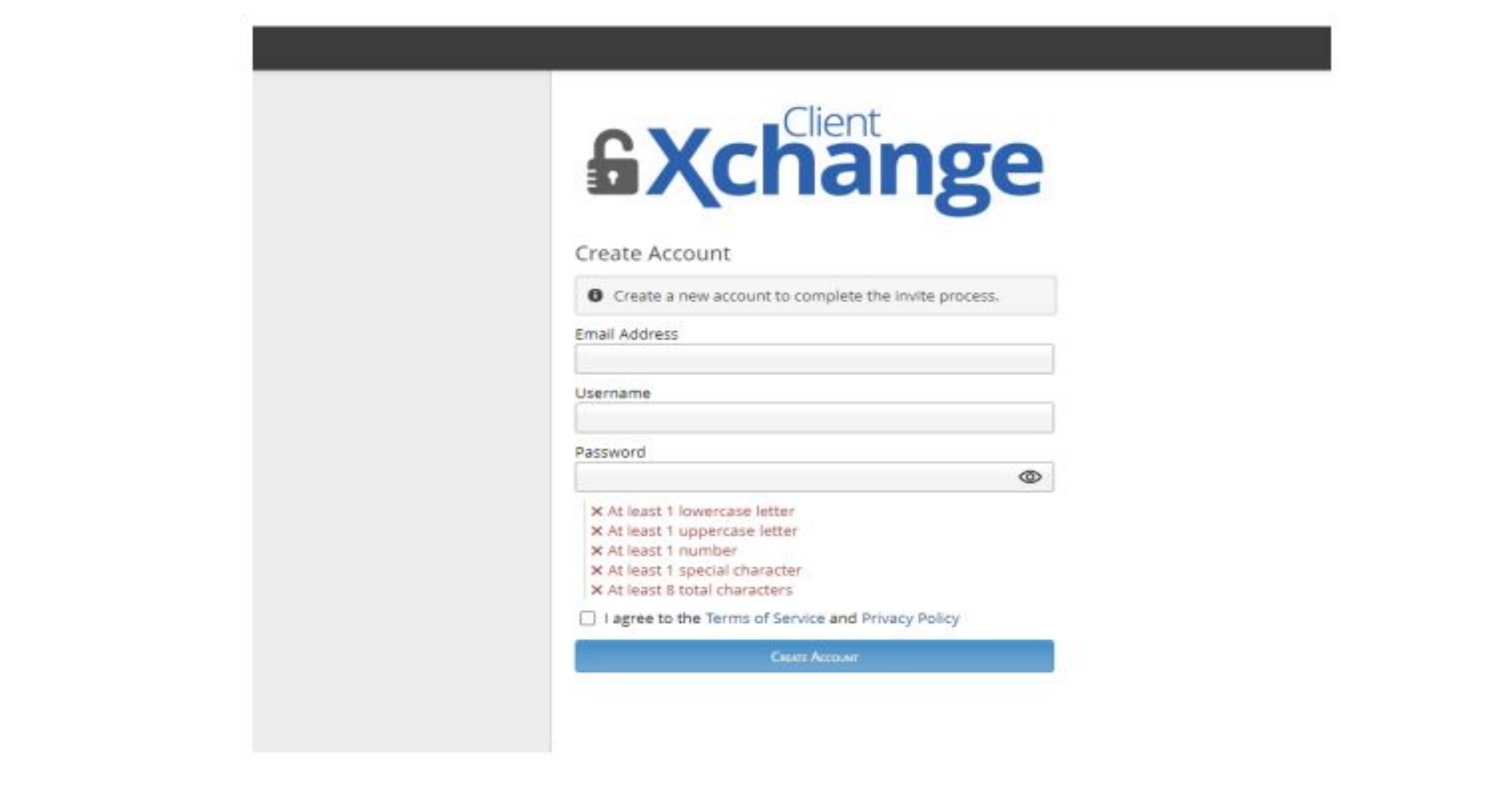
Using Client Xchange

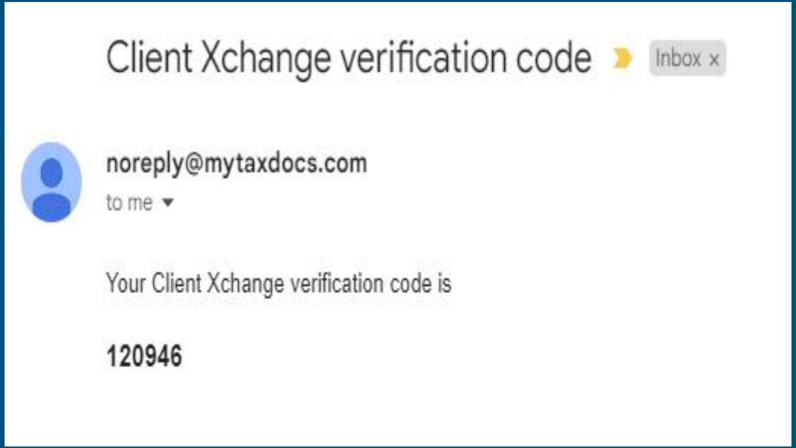
Our Secure File Sharing Portal

You will receive an invitation. To accept go to Click Here.

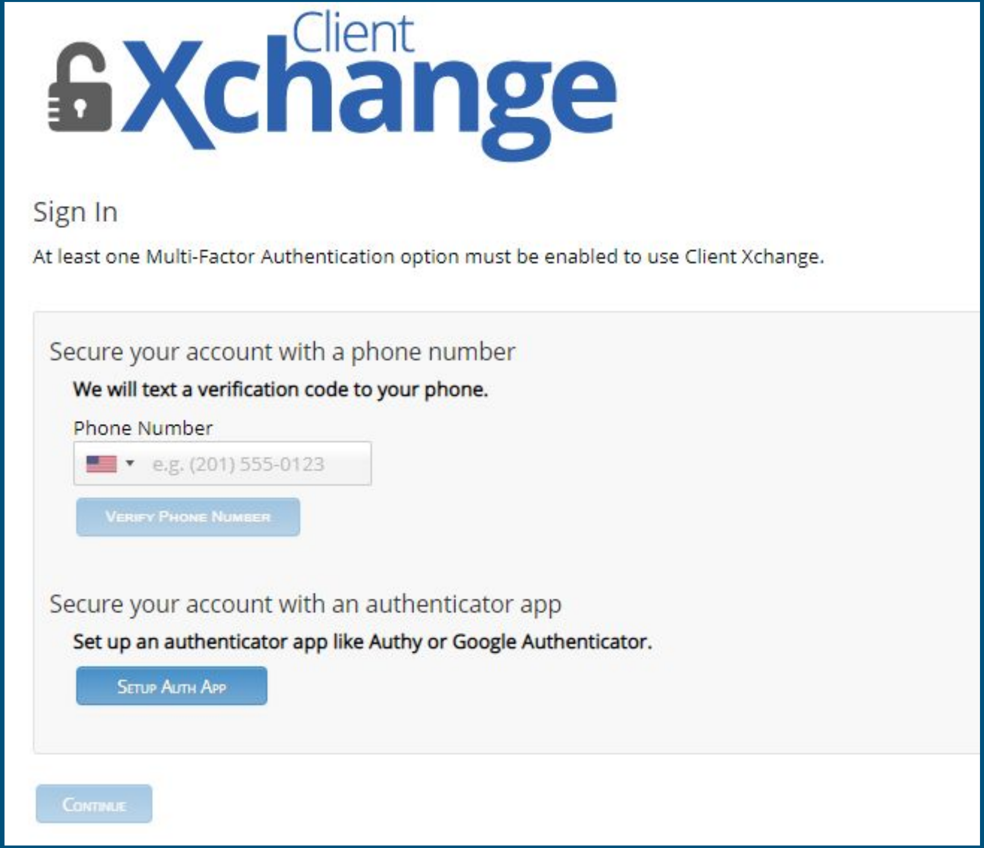
Create your account. Use the email address that was emailed with your invitation. Establish a username & password.



Enter the code from your email.

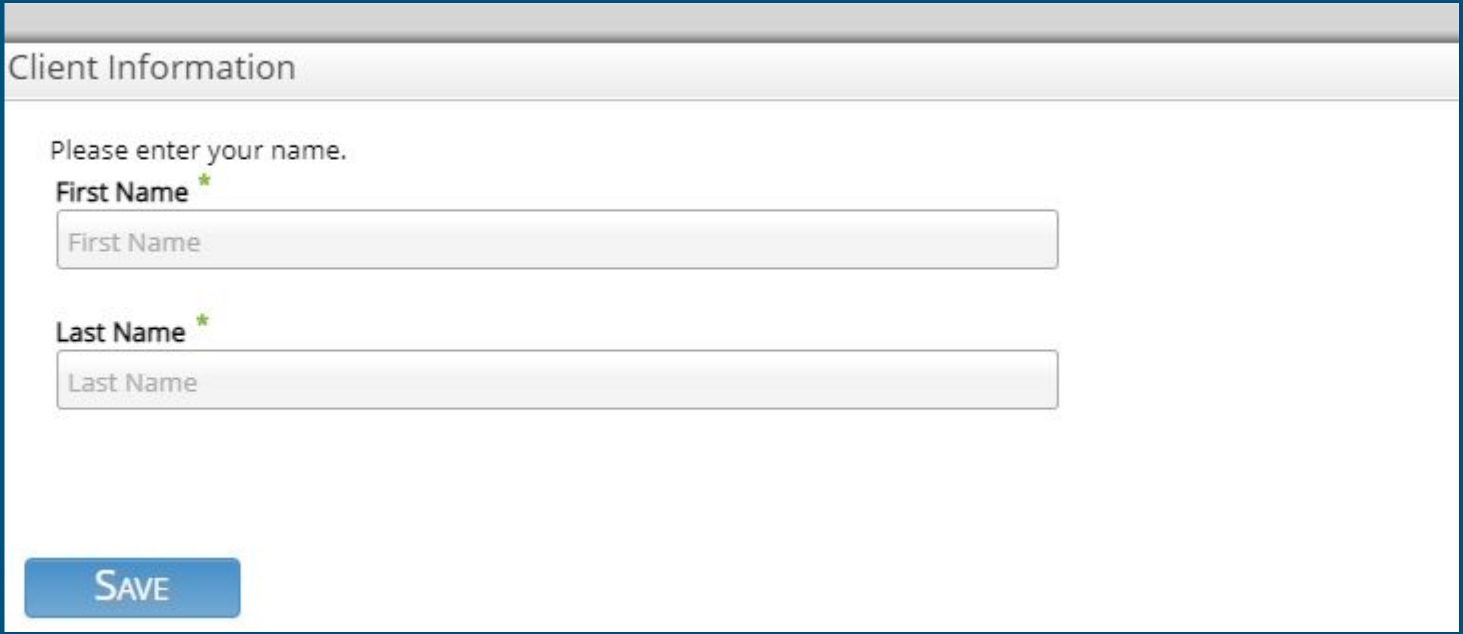


Enter your phone number. The code will be sent to your phone. Enter code.

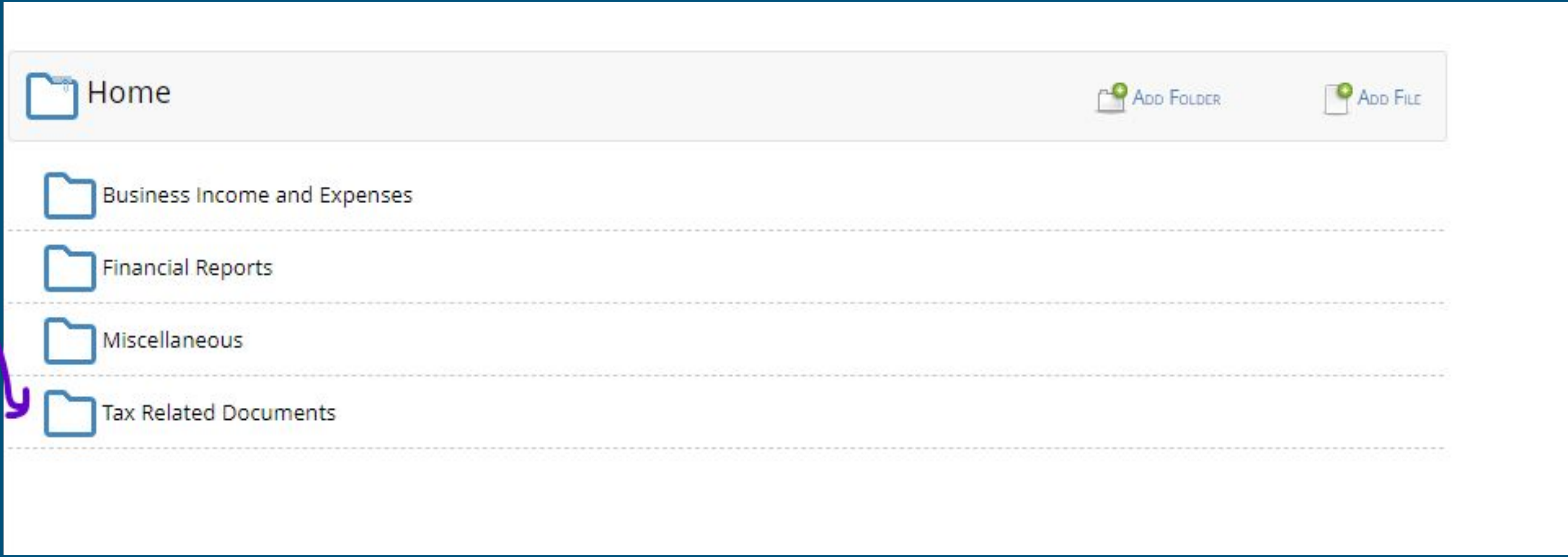


Agree to disclaimer.

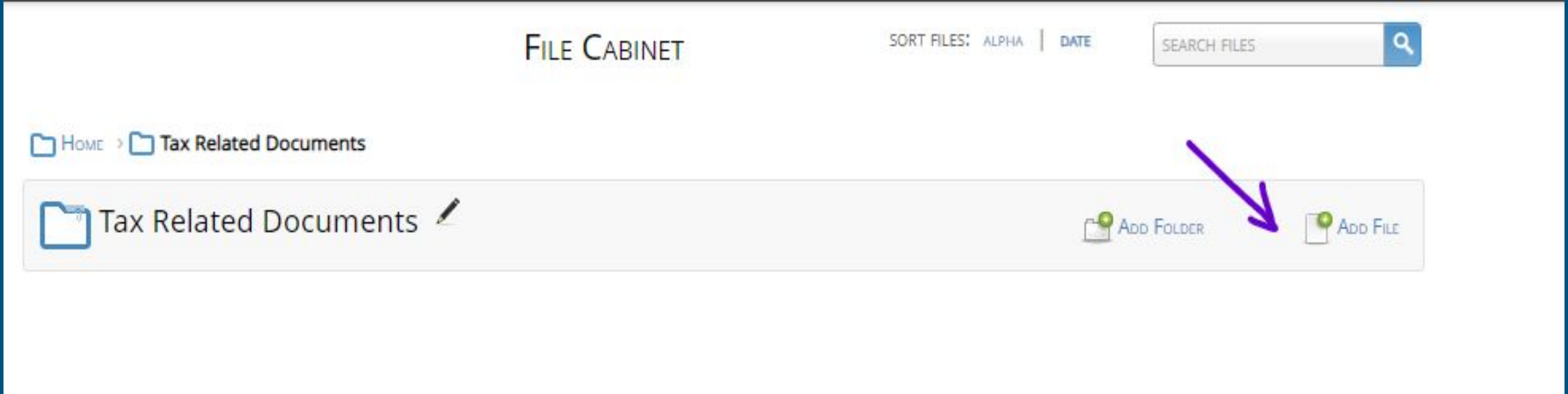
Enter name. Then save.



Select the folder that fits or create a new folder. For the majority of our clients, you should select Tax Related Documents.



Add documents by clicking "Add File". Then, download your documents.



Upload All Types of Files

You can upload just about any file type into Client Xchange. For example: Microsoft Office files (Word, Excel, etc.) • csv files of stock transactions • Any scanned documents (including .pdf and .tif) • Photos of documents, receipts, statements, etc. (including .jpg and.gif)

Once you are done, text or email your tax professional to inform them.

Phone: 704-817-8038

Email: lmtaxplus@gmail.com