



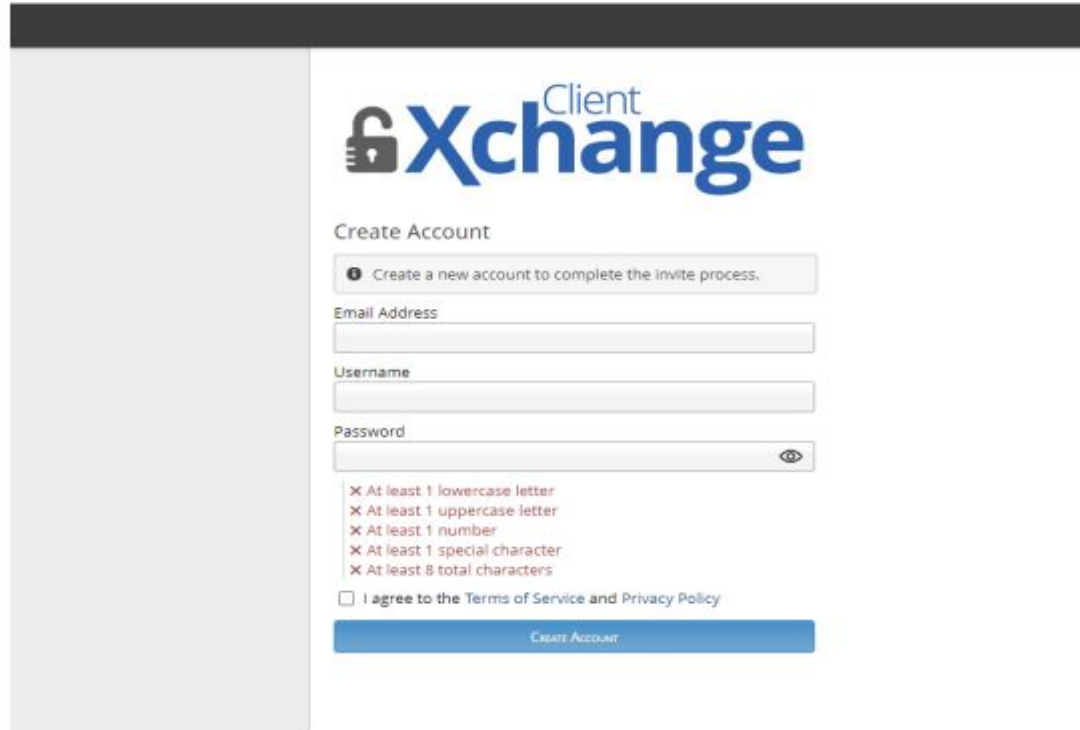
Using Client Xchange

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.



The screenshot shows the 'Client Xchange' account creation interface. The logo features a padlock icon and the text 'Client Xchange'. Below the logo is the heading 'Create Account' and an information box stating 'Create a new account to complete the invite process.' There are three input fields for 'Email Address', 'Username', and 'Password'. The password field includes a visibility toggle icon. Below the password field are five validation rules: 'At least 1 lowercase letter', 'At least 1 uppercase letter', 'At least 1 number', 'At least 1 special character', and 'At least 8 total characters'. A checkbox for 'I agree to the Terms of Service and Privacy Policy' is present, and a blue 'CREATE ACCOUNT' button is at the bottom.


Client Xchange

Create Account

i Create a new account to complete the invite process.

Email Address

Username

Password 

- × At least 1 lowercase letter
- × At least 1 uppercase letter
- × At least 1 number
- × At least 1 special character
- × At least 8 total characters

I agree to the Terms of Service and Privacy Policy

CREATE ACCOUNT

Enter the code from your email.



Create Account

Enter the code we sent to your email address (f***@g***):

↻ Resend Code

VERIFY AND SIGN IN

Client Xchange verification code  Inbox x



noreply@mytaxdocs.com

to me ▾

Your Client Xchange verification code is

120946

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



Sign In

At least one Multi-Factor Authentication option must be enabled to use Client Xchange.

Secure your account with a phone number

We will text a verification code to your phone.

Phone Number

 e.g. (201) 555-0123

VERIFY PHONE NUMBER

Secure your account with an authenticator app

Set up an authenticator app like Authy or Google Authenticator.

SETUP AUTH APP

CONTINUE

Agree to disclaimer.

Enter name. Then save.

Client Information

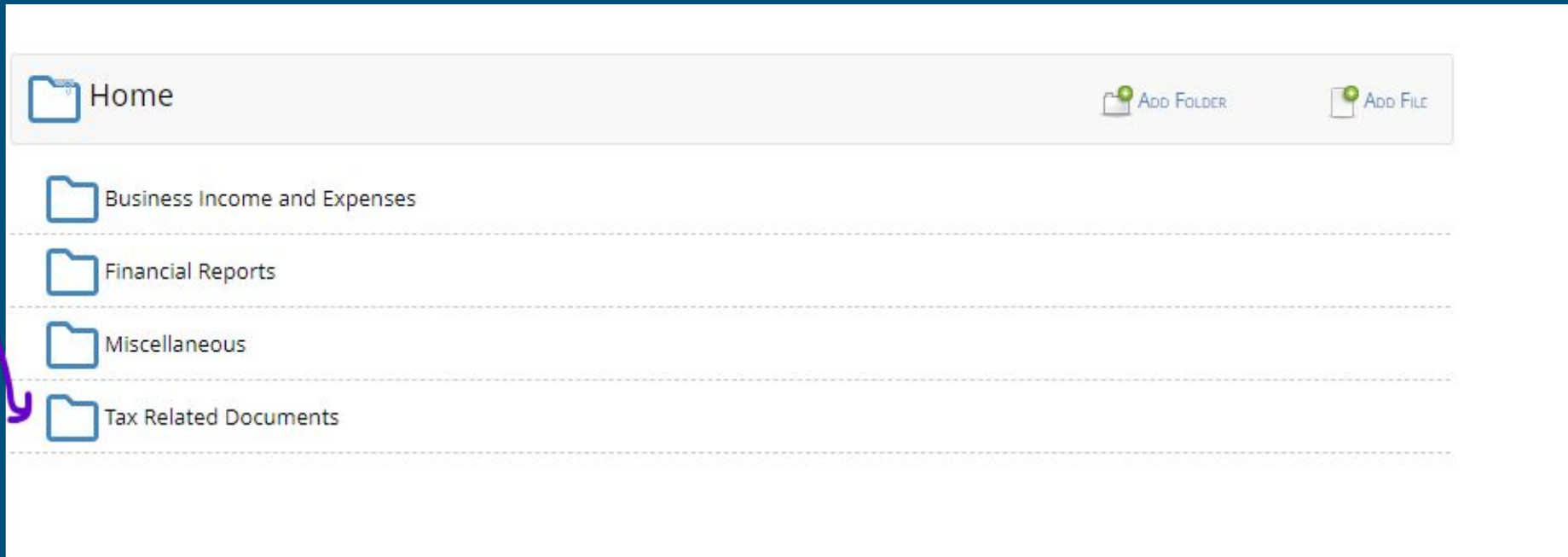
Please enter your name.

First Name *

Last Name *

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.

FILE CABINET

SORT FILES: ALPHA | DATE

SEARCH FILES



Home > Tax Related Documents

Tax Related Documents

Add Folder

Add File



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: Imtaxplus@gmail.com