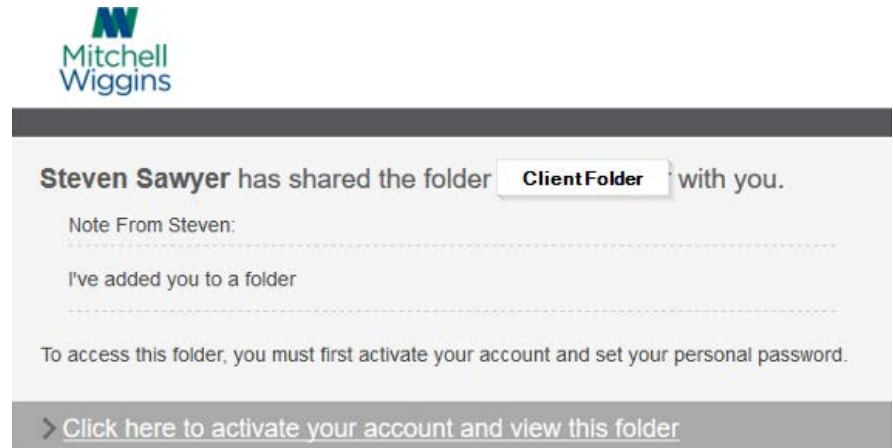


The Mitchell Wiggins client portal is a document retention center for your tax returns, financial statements, and any other relevant documents. The client portal is secure and can be accessed from any desktop or mobile device.

As a portal user, you will receive a welcome email notifying you that we have shared your client folder with you. Using this email, you will need to activate your account. Enter your name and company information if applicable, and then setup a password meeting the system's parameters.



After you've entered your name, company and set a password you will be able to access your client folder. Note that when you first access your account you may not have any documents available. Additionally, a confirmation email will be sent detailing the sign-in page and your confirmed email.



John,

You have successfully setup your account for Mitchell Wiggins.

A few things to remember:

Sign-In Page: <https://mwcpa.sharefile.com/>

Email:

To access the portal, you can go to:

- <https://mwcpa.sharefile.com>
- <https://mwcpa.com/client-portal/>

Documents that could be made available to you on the portal:

- Tax returns
- IRS Form 8879 – to electronically sign your tax returns
- Financial Statements
- Engagement letters
- Communications with management and Board of Directors

Note that documents will only be retained on the portal for three years, so please save any pertinent information for your personal records.

How to electronically sign documents:

An email from one of our professional staff will be sent to the email address attached to your portal profile. Click on “Review & Sign Document”. A window displaying the requested document will appear.

Please review the document and follow the instructions to electronically sign the document. Reminders are available at the bottom of the document if you need help signing or dating the document. Click “Submit Signature” and agree to the terms of use.

Once completed, a signed copy of the document will be saved on your client portal, as well as delivered to your email.

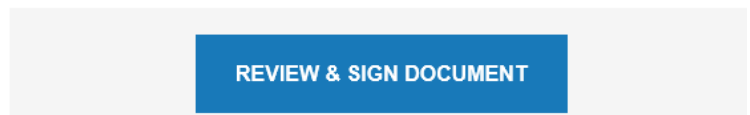
Note that you can use your keyboard, smartphone, tablet, or mouse to electronically sign these documents.

Hello Steven,
Please sign the Form 8879 so we can release your tax return. Thank you!



Form 8879 2018
(form_8879_2018.pdf)
Reference #: c25a9b00-4e45-4025-
ad38-b3a372163d18
Signers: Steven Sawyer and Josh Morrison
Status: Pending
Expires: 02/09/2019 16:51
Sender: Tim Nguyen

To review the document and sign with an electronic signature, follow this link:



What happens if I forget my password?

At the login page, click 'Forgot Password?'



Email
Password
Sign In

Remember Me

[Forgot Password?](#)

Enter your email address and follow the prompt to have a temporary password emailed to you.

What happens if I change my email address?

If you decide to change your assigned email address for your account, you can do it multiple ways.

1. You can login to your account and edit it from your Personal Settings.

Edit Email Addresses

You may log in to ShareFile using any of your confirmed emails. ShareFile notifications will be sent to your primary email address.
NOTE: Do not use this functionality to add new users to the system.

Email	Primary	Verified	Actions
<input type="text" value="Johndoe@gmail.com"/>	✓	✓	
<input type="text" value="Email"/>			

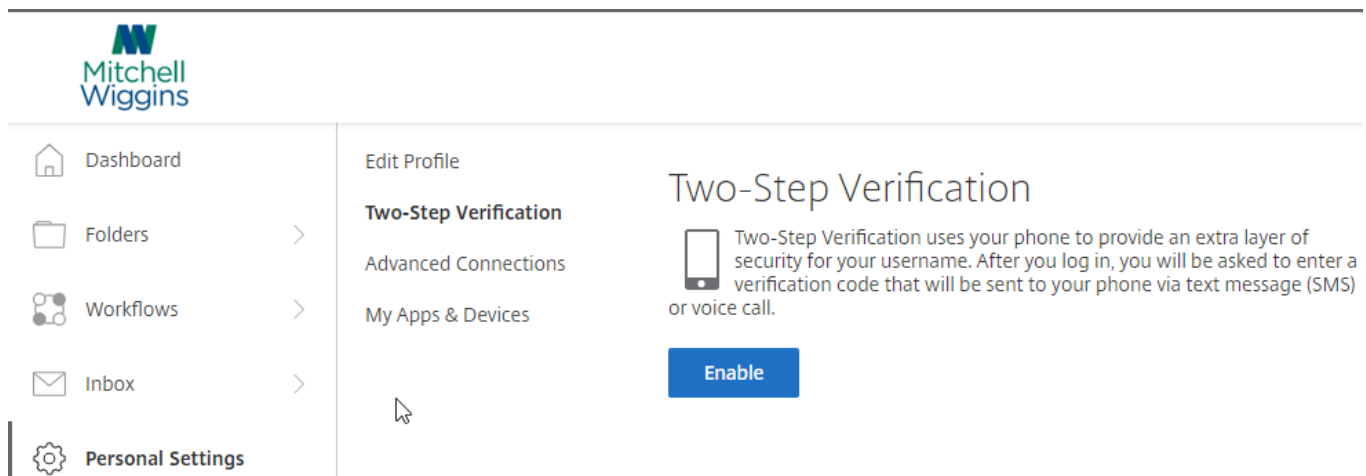
2. You can notify our Richmond office at (804) 282-6000 or our Tri-cities office at (804) 733-5566, or send an inquiry to portal@mwcpa.com.

Why can't I see any documents on my portal?

During the implementation phase in early 2019, some documents will not be available. Once your documents are ready they will be posted to your portal. An email notification will be sent notifying you when documents are available.

Can I add an extra layer of security to my client portal?

Absolutely! Within your personal account settings, you can enable “Two-Step Verification”



Click “Enable”, then add your phone number for either text or phone confirmations.

If I'm a business client and would like someone in my company to access certain documents, how would I make that happen?

If you want to discuss your individual situation, please contact the partner/manager on the engagement. We can discuss options for allowing access to various individuals.

Who should I contact if I have questions?

Please contact our Richmond office at (804) 282-6000 or our Tri-cities office at (804) 733-5566. Email inquiries can be sent to portal@mwcpa.com