

Using the client portal is a secure method of exchanging sensitive financial documents. Click button & go to www.foundtax.com/portal/

foundation tax

Go to Client Portal Login

IMPORTANT: Before you start filling in a pdf form, always **DOWNLOAD and SAVE** it to your computer first. Then **OPEN IT IN ADOBE READER** or other software. When complete, upload form per instructions below.

To **DOWNLOAD** a file:

1. Click the blue checkbox to the left of the file(s) you'd like to download.
2. Click green (or blue) "Download" button that appears above.

Secure Client Login
Exchange files quickly and securely.

Folders > 486524 > Personal Folders > Dorothy Gale

Dorothy Gale

Items in this Folder

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A file retention policy has been set for this folder. All files stored here will be deleted 1095 day(s) after they are uploaded

	Name	Size	Uploaded	Creator
<input checked="" type="checkbox"/>	2017 organizer.pdf	209 KB	1/13/18	S. Leydon
<input type="checkbox"/>	1099-MISC Worksheet.pdf	1 MB	1/13/18	S. Leydon

Storage used: 0 B

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To **UPLOAD** a file:

3. Click the circular green (or blue) button at the top right
4. Click the "Upload" button that appears
5. Upload document(s) by dragging and dropping your files on the following screen

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Upload Create Folder Create Note Create URL

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