



# A QUICK START GUIDE TO THE CLIENT PORTAL



CERTIFIED PUBLIC ACCOUNTANTS

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DENVER, CO 80246  
303-733-3796

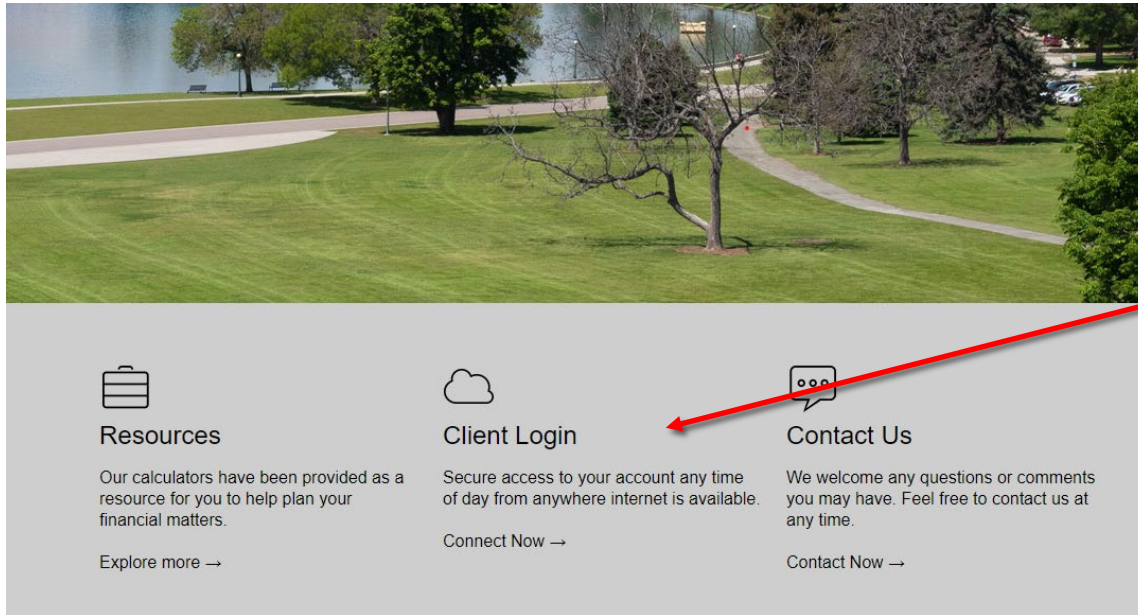
# STEP 1: LOGIN

FROM THE ADAM'S GROUP, LLC WEBSITE(<https://www.tagcpaco.com>), CLICK THE **LOGIN** BUTTON ON THE HOME PAGE, OR ON ANY PAGE. IT WILL TAKE YOU TO A SECURE LOGIN SCREEN. ENTER YOUR USERNAME and PASSWORD AND CLICK THE **LOG IN** BUTTON.

YOUR USERNAME & PASSWORD SHOULD HAVE BEEN GENERATED AFTER YOU RECEIVED OUR 'WELCOME EMAIL' WITH A LINK TO REGISTER YOUR ACCOUNT.

*(PLEASE CONTACT US IF YOU DIDN'T RECEIVE THIS EMAIL).*

ALSO NOTE THE '**PORTAL FAQ**' LINK ON THE TOP PORTAL MENU FOR MORE INFORMATION.



## Resources

Our calculators have been provided as a resource for you to help plan your financial matters.

[Explore more →](#)



## Client Login

Secure access to your account any time of day from anywhere internet is available.

[Connect Now →](#)



## Contact Us

We welcome any questions or comments you may have. Feel free to contact us at any time.

[Contact Now →](#)

# STEP 2: PORTAL HOME PAGE

ONCE LOGGED IN, YOU WILL SEE THE PORTAL HOME PAGE. ON THE RIGHT SIDE OF THE PAGE ARE TASKS. THERE MAY ALSO BE INFORMATION ABOUT YOUR TAX ORGANIZER.

The screenshot displays the NetClient CS portal home page. At the top, there is a navigation bar with 'Home' and 'Messages' (with a notification badge). Below this is a sidebar on the left containing 'NetClient CS', 'Documents', 'File Exchange', and a folder named 'JEFFERIES, MEGAN' with a 'Tax Org' tag. The main content area is titled 'Home' and features a 'Tasks' section with two items: a warning icon for 'Please view the Action Items document in the JEFFERIES, MEGAN folder at your earliest convenience and then send it to your preparer when complete.' (about 2 hours ago) and a document icon for 'Your Tax Organizer is ready! Enter your tax information and then send to your preparer when complete.' (about 2 hours ago). Below the tasks is a 'Tax Organizer' section with a refresh icon, containing 'Enter Tax Information' for 'Megan Jefferies' with a status of 'New' and a last modified date of '12/17/2020 12:49 PM'. An 'Upload Tax Documents' button is located at the bottom right of this section.

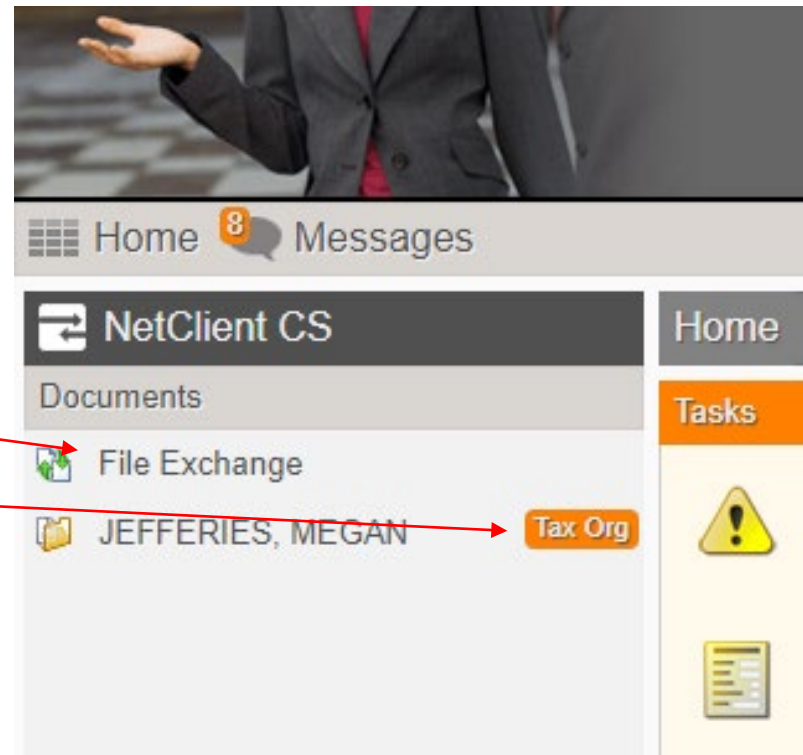
# STEP 3: NAVIGATION

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THE LEFT SIDE IS THE NAVIGATION PANE. THE TWO MAIN AREAS YOU WILL BE USING ARE AT THE TOP:

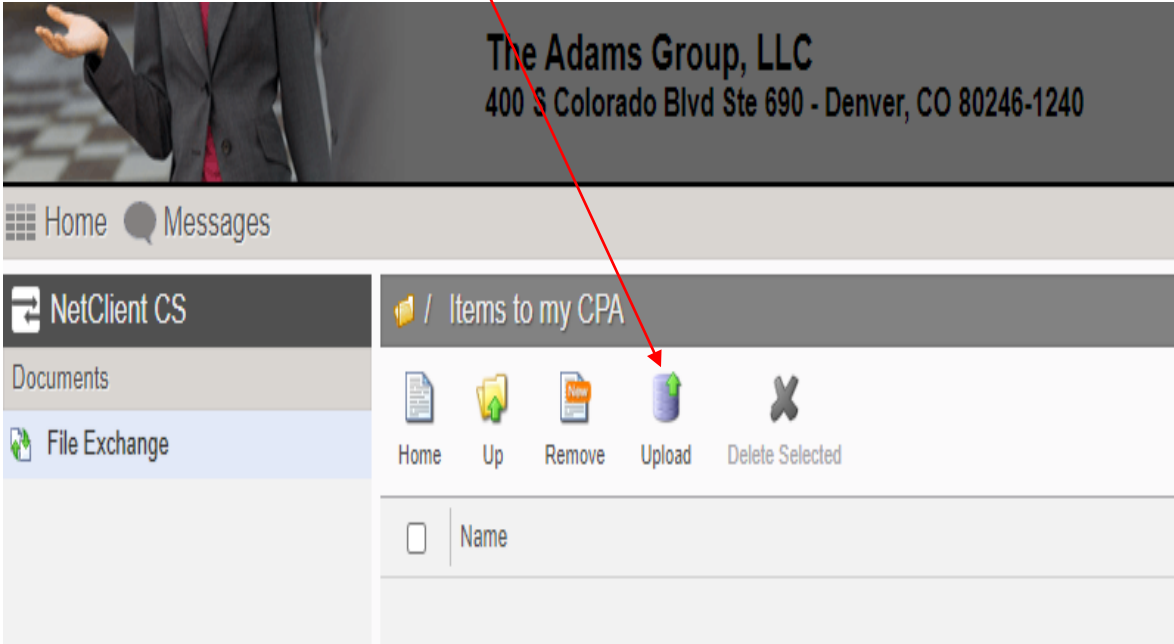
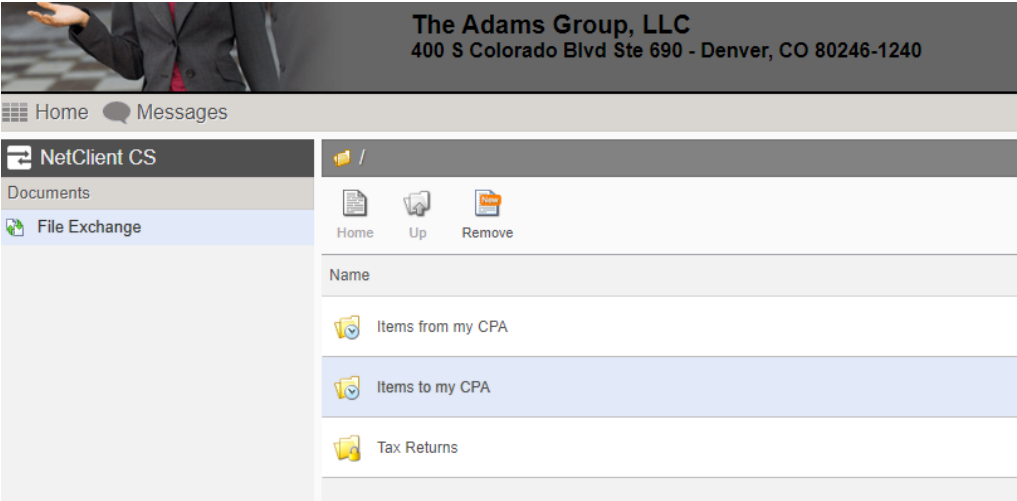
1) FILE EXCHANGE

2) TAXORG (YOUR TAX ORGANIZER)



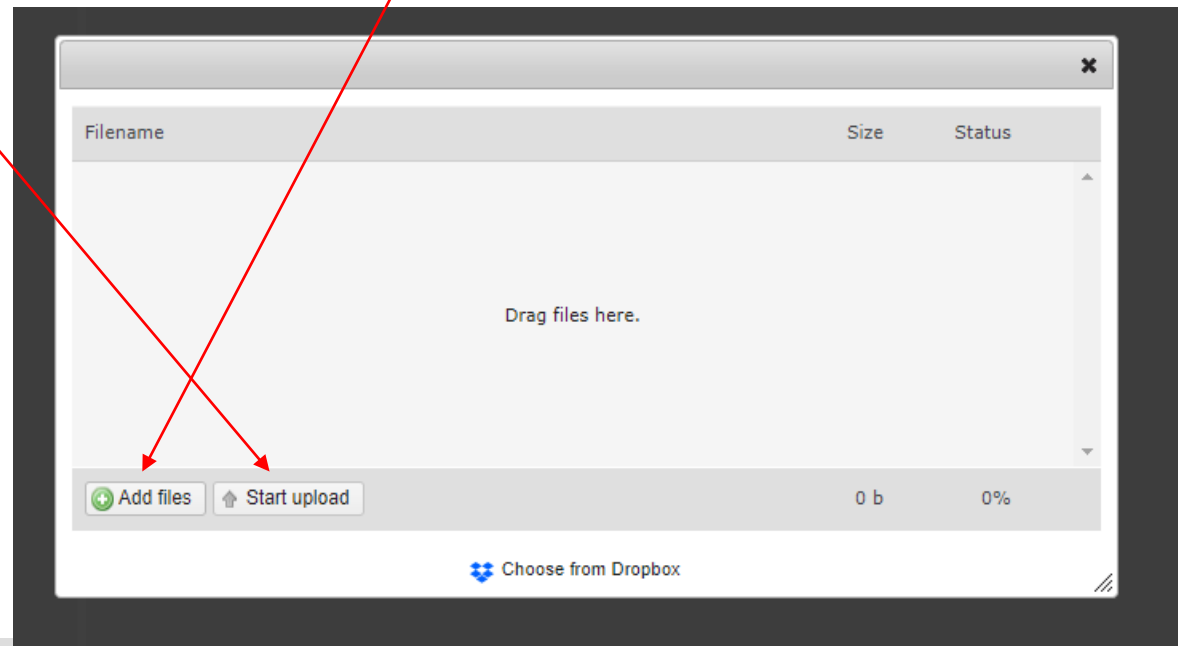
# STEP 4: FILE EXCHANGE

THE FILE EXCHANGE FEATURE ALLOWS YOU & THE ADAMS GROUP TO EASILY & SECURELY UPLOAD & DOWNLOAD FILES. CLICK ONE OF THE FOLDERS ON THE RIGHT-HAND SIDE TO VIEW & UPLOAD FILES. TO TRANSFER FILES TO TAG, CLICK THE "INFORMATION TO MY CPA" FOLDER & CLICK THE **UPLOAD** ICON.



# STEP 4: FILE EXCHANGE (CONTINUED)

A NEW WINDOW WILL APPEAR. CLICK THE **ADD FILES** BUTTON & BROWSE YOUR COMPUTER FILES TO FIND THE CORRECT FILE(S). YOU MAY SELECT MULTIPLE FILES AT ONE TIME AS WELL AS DRAG & DROP FILES INTO THE OPEN WINDOW. ONCE YOU HAVE SELECTED ALL FILES, CLICK THE **START UPLOAD** BUTTON. YOUR TAX MANAGER & PREPARER WILL AUTOMATICALLY GET A NOTIFICATION OF YOUR UPLOADED FILES.



# STEP 5: TAX ORGANIZER

THE ORGANIZER ALLOWS YOU TO ENTER INFORMATION FOR THE ADAMS GROUP IN AN EFFICIENT MANNER. IF WE COMPLETED YOUR PRIOR YEAR TAX RETURNS, THAT INFORMATION IS PRE-POPULATED ON THE FORM, ALLOWING YOU TO EASILY SEE CHANGES, DETECT DISCREPANCIES, MISSED DEDUCTIONS AND MAKE COMMENTS ABOUT THE CURRENT YEAR TAX SITUATION (IF ANY EVENTS OCCURRED – I.E. TAXPAYER OR SPOUSE WAS LAID OFF OR RETIRED, A HOME WAS PURCHASED, NEW INVESTMENT ACCOUNTS OPENED, A DEPENDENT STARTED COLLEGE, ETC.).

CLICK THE **SAVE & CLOSE** BUTTON TO SAVE YOUR INFORMATION.

Home 8 Messages Megan Jefferies Help

Tax Organizer Index Letter > Cover Letter

Send to Preparer Save & Close Create PDF

Last saved: 12/17/2020 12:49 PM

Uploaded Tax Documents

- Letter
- Cover Letter
- Questionnaire
- Notes
- General
- Electronic Filing
- Income
- Educate
- States

The Adams Group, LLC  
400 S Colorado Blvd Ste 690  
Denver, CO 80246  
303-733-3796

MEGAN JEFFERIES  
[REDACTED]  
DENVER, CO 80003

Dear MEGAN:

This Tax Organizer is designed to help you gather the tax information needed to prepare your 2020 personal income tax return. To help you complete the Organizer with minimal time and effort, when available, you will find certain information from your 2019 personal income tax return.

To protect your privacy, your Tax Organizer contains masked data. Masked data displays as asterisks. For example, a Social Security number could display as \*\*\*.\*\*-6789, an account number as \*\*\*\*\*6789, and a date of birth as \*\*/\*\*/2000. If you would like to confirm the masked data or make a change to your data, please contact this office. Do not indicate any changes to your data on your Tax Organizer. When you receive your completed tax return(s), make sure you review all Social Security numbers, bank account numbers, and dates of birth for accuracy.

Enter 2020 information on the Tax Organizer pages provided. If any information does not apply to you or is incorrect, please delete it or make the necessary corrections.

Please answer all applicable questions and use the Notes to Preparer screen to enter additional information not provided in the Tax Organizer. The Notes to Preparer screen is also available for any questions that you may have for our office.

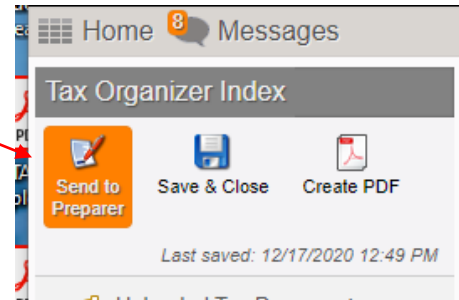
You will also need to provide the following information:

- Forms W-2 for wages, salaries and tips.
- All Forms 1099 for interest, dividends, retirement, miscellaneous income, unemployment compensation, nonemployee compensation, Social Security, state or local refunds, gambling winnings, etc.
- Brokerage statements showing investment transactions for stocks, bonds, virtual currencies, etc.
- Schedule K-1 from partnerships, S corporations, estates and trusts.
- Statements supporting educational expenses, deductions or distributions, including any Forms 1098-T, 1098-E, or 1099-Q.
- All Forms 1095-A, 1095-B, and/or 1095-C related to health care coverage or the Premium Tax Credit.
- Statements supporting deductions for mortgage interest, taxes, and charitable contributions (including any Form 1098-C).
- Copies of closing statements regarding the sale or purchase of real property.
- Legal papers for adoption, divorce, or separation involving custody of your dependent children.
- Notice 1444 showing the amount of the Economic Impact Payment (EIP) you received.

# STEP 6: SEND TO PREPARER

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ONCE YOU'RE FINISHED UPLOADING FILES & FILLING OUT THE ORGANIZER, CLICK THE **SEND TO PREPARER** BUTTON. THIS CLOSES THE ORGANIZER AND ALLOWS YOUR TAX MANAGER TO VIEW YOUR MATERIAL.



**NOTE: ONCE YOU SELECT THE SEND TO PREPARER BUTTON, YOU WILL NOT BE ABLE TO MODIFY THE ORGANIZER.**

AFTER SENDING THE ORGANIZER, IF YOU HAVE MORE DOCUMENTS TO SEND TO YOUR TAX PREPARER, PLEASE USE FILE EXCHANGE (SEE STEP 4 SLIDE).