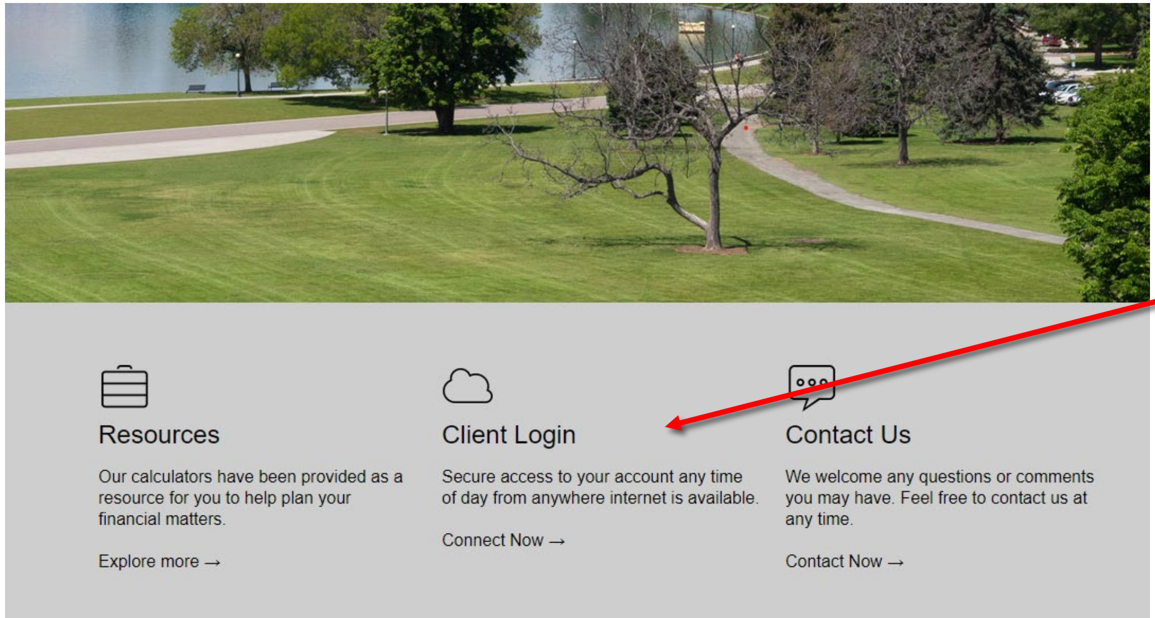
THE ADAMS GROUP, LLC

CERTIFIED PUBLIC ACCOUNTANTS

A QUICK START GUIDE TO THE CLIENT PORTAL

400 S COLORADO BLVD., STE 690
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.

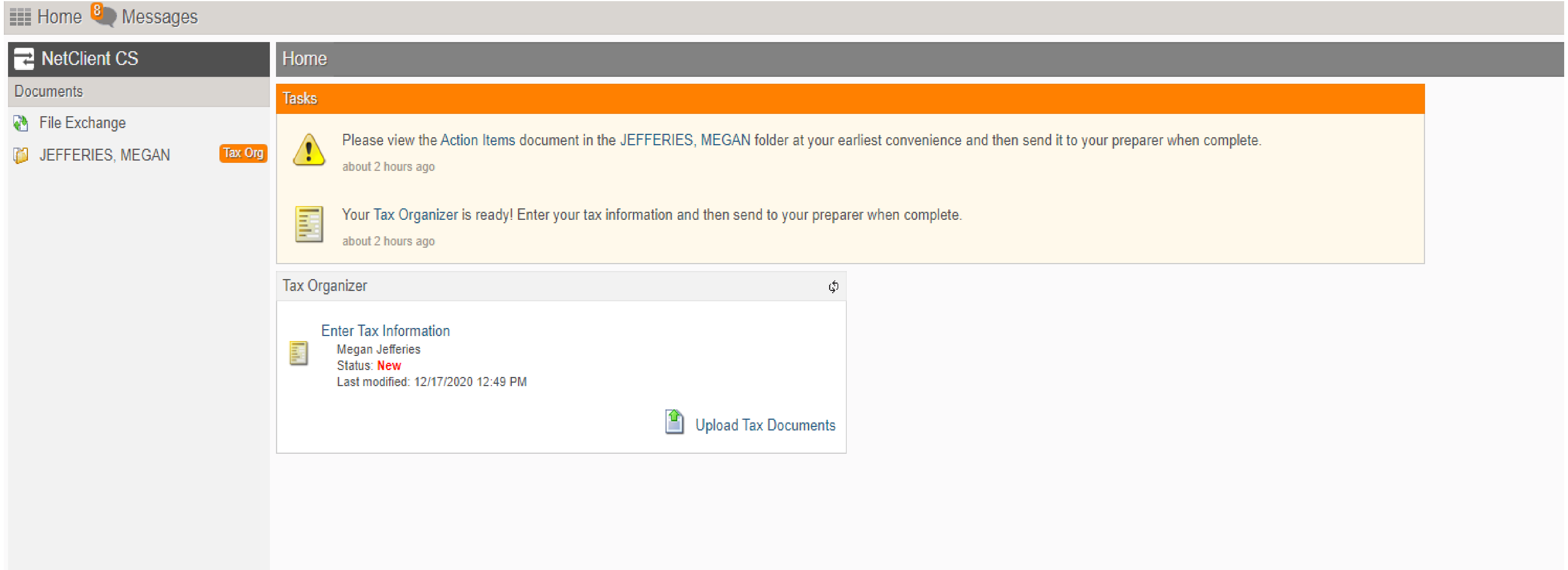
YOUR USERNAME & PASSWORD SHOULD HAVE BEEN GENERATED AFTER YOU RECEIVED OUR 'WELCOME EMAIL' WITH A LINK TO REGISTER YOUR ACCOUNT.

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

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

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.

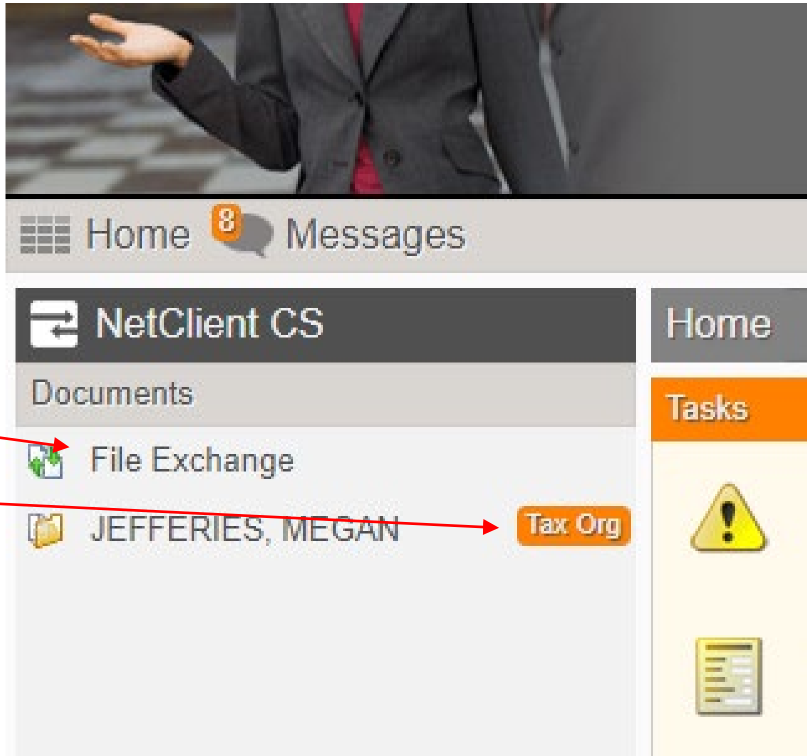


STEP 3: NAVIGATION

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

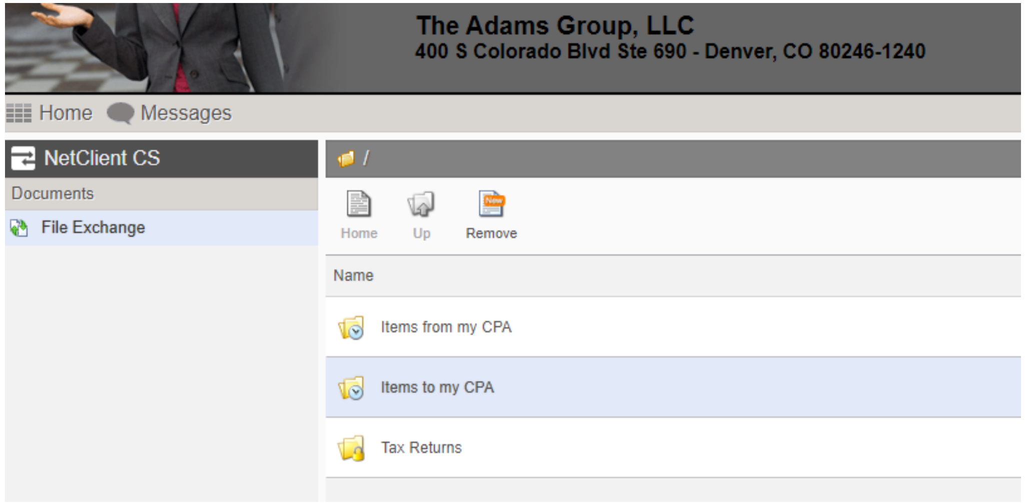
1) FILE EXCHANGE

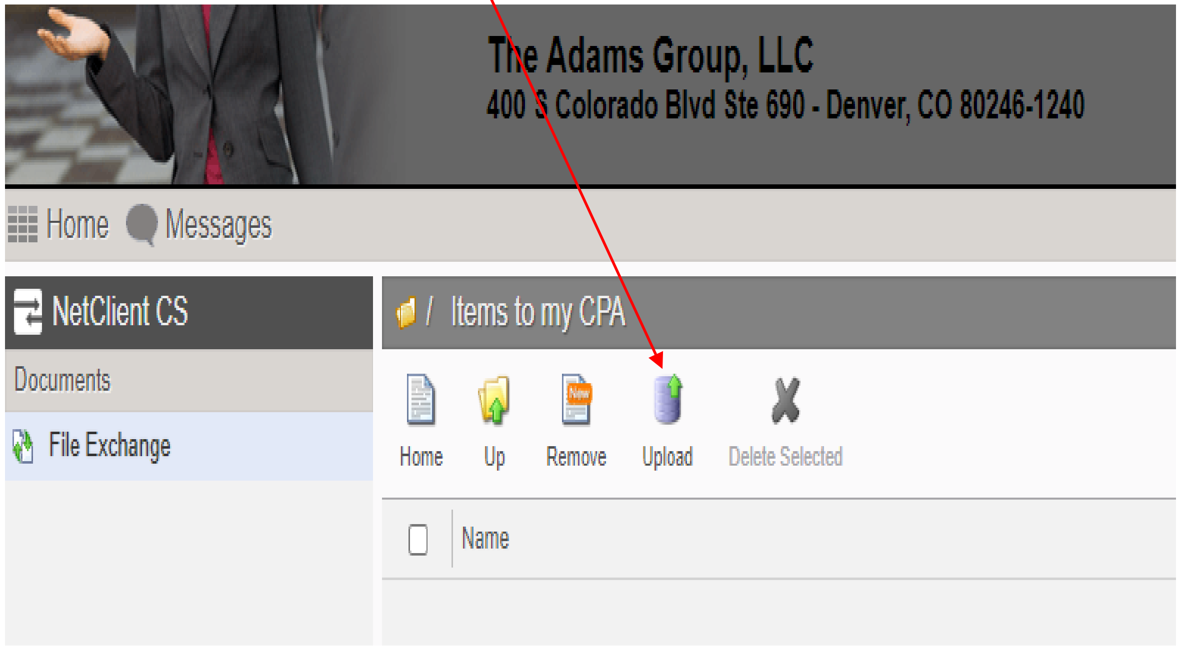
2) TAXORG (YOUR TAX ORGANIZER)



STEP 4: FILE EXCHANGE

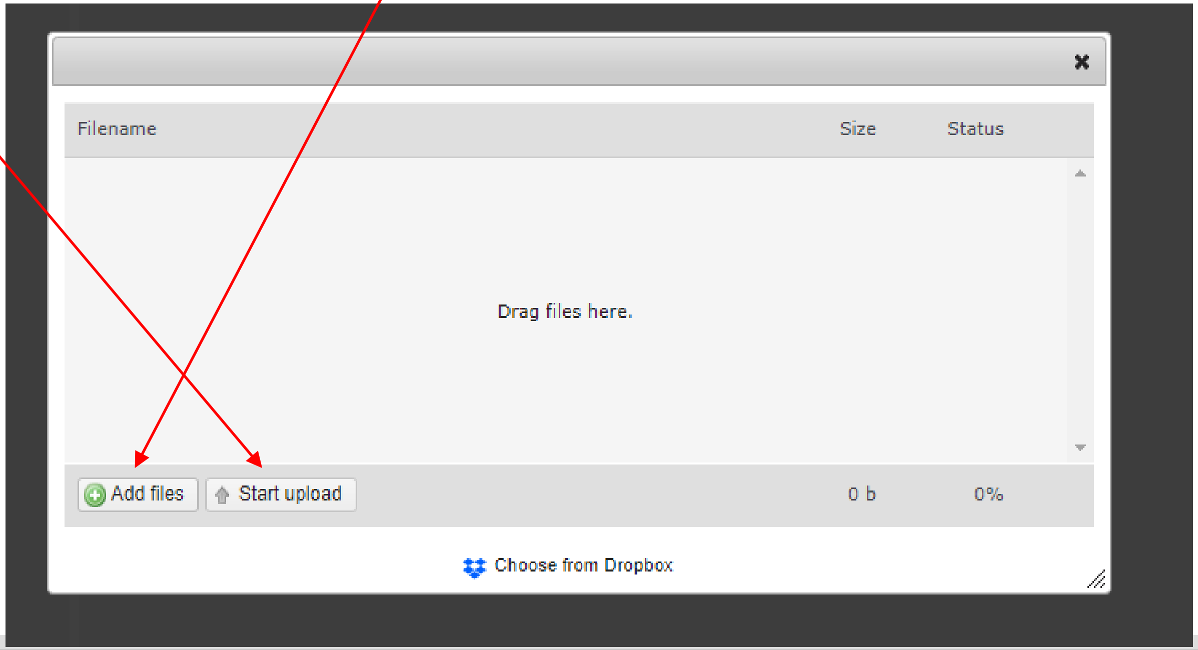
THE FILE EXCHANGE FEATURE ALLOWS YOU & THE ADAMS GROUP TO EASILY & SECURELY UPLOAD & DOWNLOAD FILES. CLICK ONE OF THE FOLDERS ON THE RIGHT-HAND SIDE TO VIEW & UPLOAD FILES. TO TRANSFER FILES TO TAG, CLICK THE “INFORMATION TO MY CPA” FOLDER & CLICK THE **UPLOAD** ICON.





STEP 4: FILE EXCHANGE (CONTINUED)

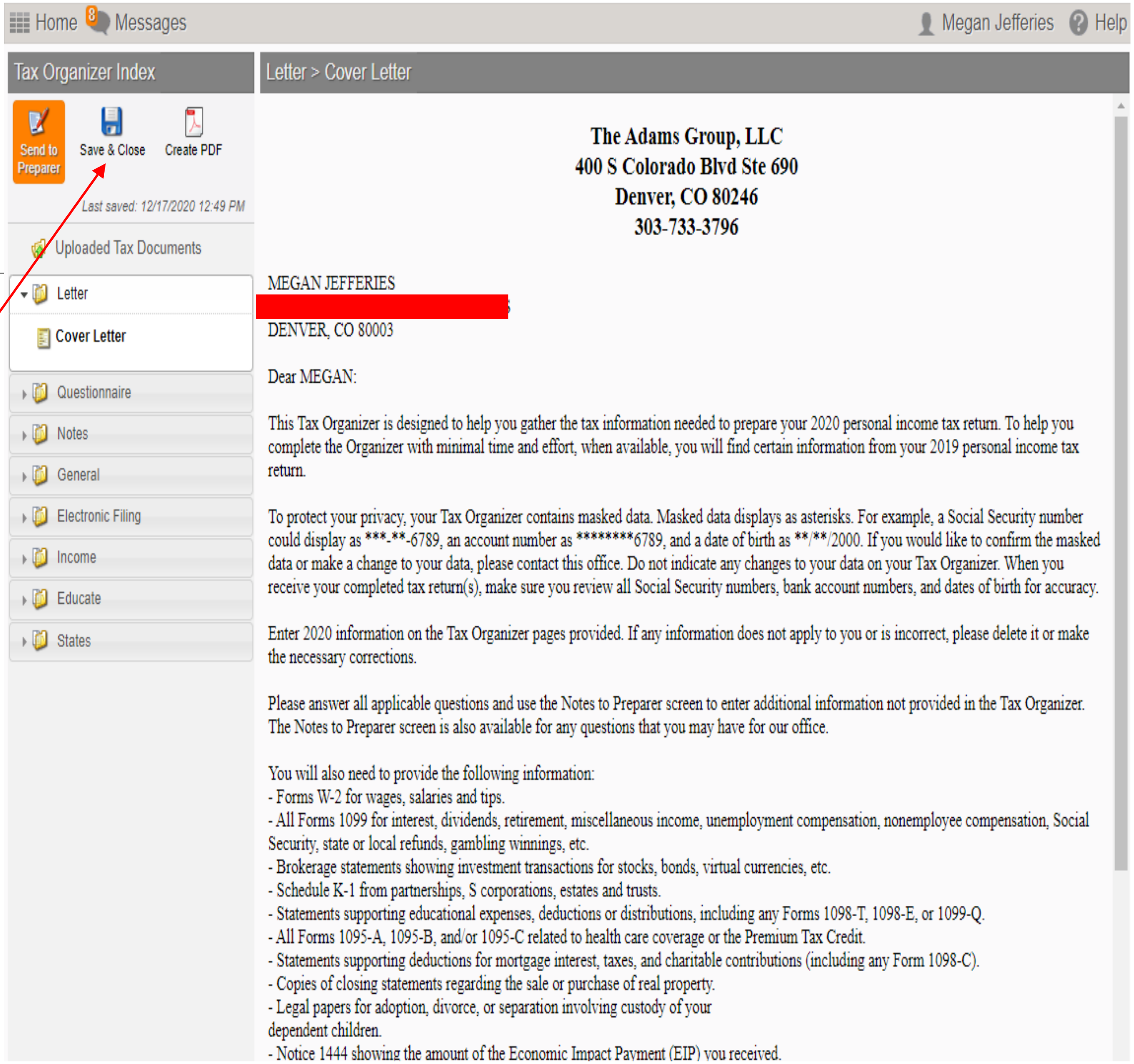
A NEW WINDOW WILL APPEAR. CLICK THE **ADD FILES** BUTTON & BROWSE YOUR COMPUTER FILES TO FIND THE CORRECT FILE(S). YOU MAY SELECT MULTIPLE FILES AT ONE TIME AS WELL AS DRAG & DROP FILES INTO THE OPEN WINDOW. ONCE YOU HAVE SELECTED ALL FILES, CLICK THE **START UPLOAD** BUTTON. YOUR TAX MANAGER & PREPARER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



STEP 5: TAX ORGANIZER

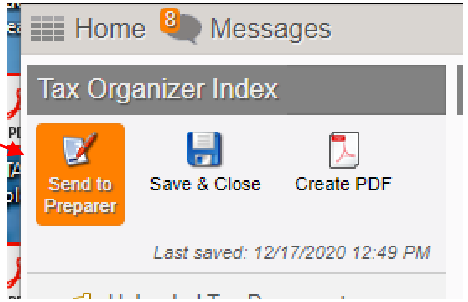
THE ORGANIZER ALLOWS YOU TO ENTER INFORMATION FOR THE ADAMS GROUP IN AN EFFICIENT MANNER. IF WE COMPLETED YOUR PRIOR YEAR TAX RETURNS, THAT INFORMATION IS PRE-POPULATED ON THE FORM, ALLOWING YOU TO EASILY SEE CHANGES, DETECT DISCREPANCIES, MISSED DEDUCTIONS AND MAKE COMMENTS ABOUT THE CURRENT YEAR TAX 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.



STEP 6: SEND TO PREPARER

ONCE YOU'RE FINISHED UPLOADING FILES & FILLING OUT THE ORGANIZER, CLICK THE **SEND TO PRERPARER** 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).