



TAX PRO SOLUTIONS, INC.

CREATING YOUR PROFILE ON THE CLIENT PORTAL

Step 1: Look for an email with the link in your mailbox with the following information

(**Note:** Check Spam Folder if you do not see the link in your Inbox):

no-reply@securefile. You Have a New Portals Account with Tax Pro Solutions, Inc. - Hello John Doe, A new Drake Portals a...

Step 2: Once you open the email, **before clicking on Sign In**, read the instructions for important information and make sure you scroll all the way down to read the entire instructions:

NOTE: PLEASE READ the instructions below carefully to create an account:

INDIVIDUAL CLIENTS ONLY:

Step 1. Open/Click the link within the email

Step 2. Create an account

Step 3. After creating account, make sure to complete your **Profile** and **"Information is correct"** box is checked.

Step 4. All of the following **documents are required** unless they do not apply to you (additional documents besides from the following list might be required, we will let you know if needed):

- Complete and Sign the Organizer (**Required**) - **NOTE: This will be available for access once you complete your profile**
- W-2, 1099-MISC, 1099-NEC, 1099-INT, 1099-DIV, Retirement, Pension/Annuity, etc.
- Mortgage statement, property tax statement, charitable contributions, medical expenses, etc. (if applicable)
- Health Coverage Forms (e.g. 1095-A, 1095-B, 1095-C)
- Copy of your Social Security Card (if available)
- Copy of your driver's license (**Note:** NY residents ONLY upload copy of front & back)
- Copy of your last two (2) years of tax return filed, including all pages, forms, schedules, etc. (**Required if you are a New Client**)
- Divorce decree, separation agreement
- All other documents pertinent to your tax filing

THE FOLLOW IS REQUIRED IF YOU ARE CLAIMING DEPENDENTS:

- Copy of your dependent's Social Security Card and Birth Certificate (**Required**).

Step 3: Click on **'Sign In'** and create your account by following on-screen instructions:

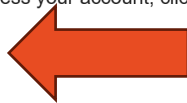
Hello **John Doe**,

A new Drake Portals account has been created for you by **Tax Pro Solutions, Inc.**

Your username is: **JDoe**

To create your password and access your account, click the button below.

Sign In

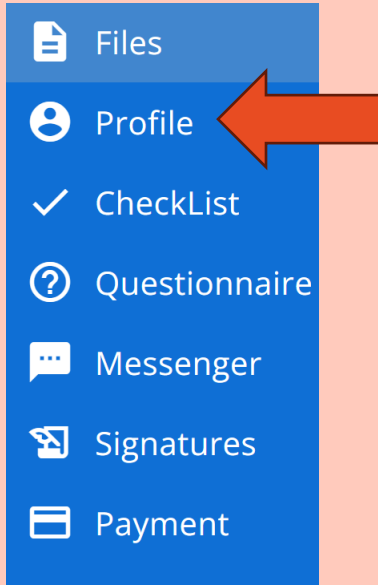


If you have any questions, please contact us.



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Step 4: Click on **“Profile”** from the left menu:



Step 5: Complete your **Profile** in its entirety:

The form is divided into four main sections, each with a red arrow pointing to it:

- Taxpayer:** Includes fields for SSN, First Name, Last Name, Phone, Email, and Date of Birth. A "Business" toggle is visible.
- Spouse:** Includes fields for SSN, First Name, Last Name, Phone, Email, and Date of Birth.
- Mailing Address:** Includes fields for Address, City, State (dropdown), Zip, and County.
- Dependents:** A section header with a red arrow pointing to it.



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Step 6: Click on the Checkbox next to “Information is Complete”

Mailing Address

Address City

State Zip County

Dependents

Information is complete