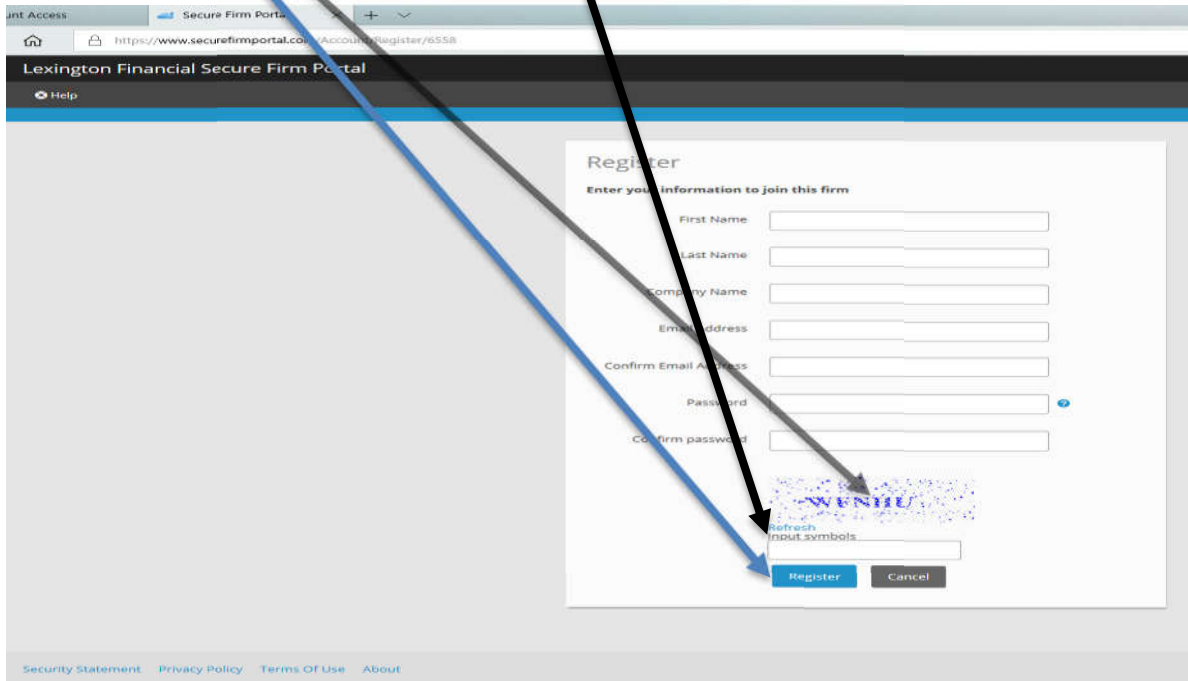


Client Document Portal Instructions

If you have any issues logging in, please call us. If you have changed your email within the last year, you will need to activate a new account to update the email address for the Portal. All password reset emails are sent to the email address associated with the Portal account.

1. Portal Access – Logging On

- I. Lexington Financial will create a Portal account on your behalf.
 - If you already have a username and password proceed to step VI.
- II. You will receive an email with a link to our Portal’s Register page, Click on the link.
- III. You will be brought to the “**Register**” screen shown below. Please fill-in all fields and create a Password.
 - **Password Tips:** <http://www.productivity501.com/10-tips-for-creating-secure-passwords/253/>. This website will provide you 10 tips for creating a secure password.
- IV. Enter the **Security Symbols** in the “**Input Symbols**” box.
- V. Click the “**Register**” box at the bottom of the page.



- VI. Go to the Lexington Financial Webpage by clicking the link below.
 - <https://www.lexington-finance.com/>
- VII. Once you are on the Lexington Financial webpage click on “**Client Login**” button. This will take you to the login screen shown in step 8.



VIII. Click on the **“Client Document Portal”** button.

Investor360®

Click the Investor360® to access your account online. You can learn more about Investor360® by accessing our [Investor360® user guide](#).

Watch this short video to learn how Investor360® delivers easy online access to your complete financial life.

Click the button below to view our Secure Client Portal.

Client Document Portal

Right Capital

IX. Login by entering your **“Email Address”** and **“Password”** you created in step 3.

Secure Firm Portal

https://www.securefirmportal.com/Account/Login/6558

Lexington Financial Secure Firm Portal

Help

Login

Use your personal account to log in.

Email Address

Password

Log in

[Forgot your Password?](#)

Not yet a member? [Register here.](#)

X. After logging into the Portal, Proceed to one of the appropriate Steps 2-6 below.

USING the Client Document Portal

2. Types of Documents Available on the Document Portal

- i. “*My Documents*” (your documents) – documents that you alone can see, access, and retrieve.
- ii. “*Public documents*” – documents that everyone can see, access, retrieve, update with their information and then upload to their private folder “My Documents”.

3. How to Upload Tax Documents from your Computer to the Document Portal

- I. Click on the **Home** button.
- II. Click on the **My Documents** folder.
- III. Click on the **2022 Tax Return Docs** folder.
- IV. Click on the **Upload** button located on the left side of the tool bar at the top of the page.
- V. Navigate to where the document is located on your computer’s hard drive.
- VI. Click and highlight the document you want to upload and click the **Open** button.
- VII. Click the **Upload** button.

4. How to View and Download Your Completed Tax Return upon Being Notified Your Tax Return is Complete

- I. Click on the **Home** button.
- II. Click on the **My Documents** folder.
- III. Click on the **2022 Tax Return Docs** folder.
Click on the **2022** Tax Return (Client name) - Client Copy
- IV. Click on the **document** and the “File Download Window” will display.
- V. To view the document, click “**Open**”.
 - i. To save the document to your computer, click “**Save**”. Remember where you saved the document on your hard drive.

5. Retrieving and Using Public Documents

- I. To retrieve documents that are accessible by everyone (*Public documents*), click on the **home** button at the top left of the page.
- II. Click on the **Public Documents** folder.
- III. To view and save a public document to your computer follow the instructions under “To View or Download a document” above.
- IV. To upload a public document **to your client folder**, “My Documents Folder”, you must first save it to your computer, and then follow the instructions for uploading to the Portal.

6. Document Availability Notifications

- I. When documents are uploaded to the Portal, Lexington Financial will send you an email notifying you that a new document is available for you to download.
- II. Every time you upload a document to the Client Document Portal for delivery to Lexington Financial, an email will automatically be sent to Lexington Financial notifying us that a new document is available for us to download.