



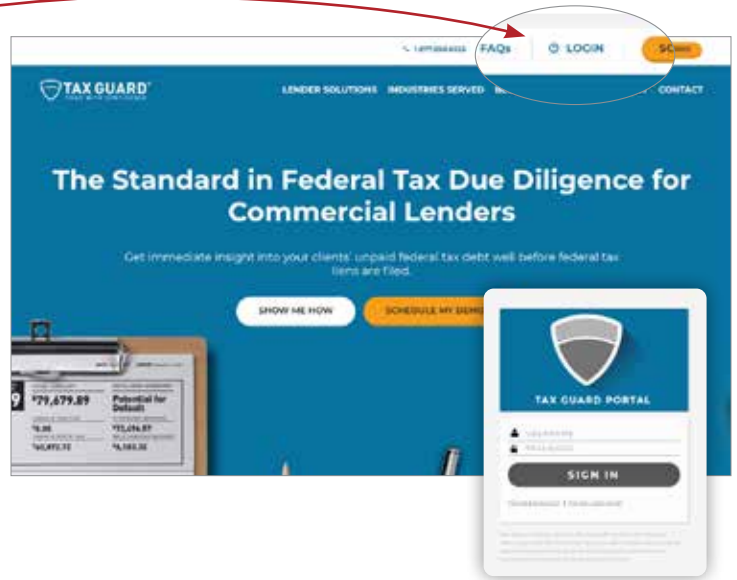
TAX GUARD
FUND WITH CONFIDENCE

USER GUIDE

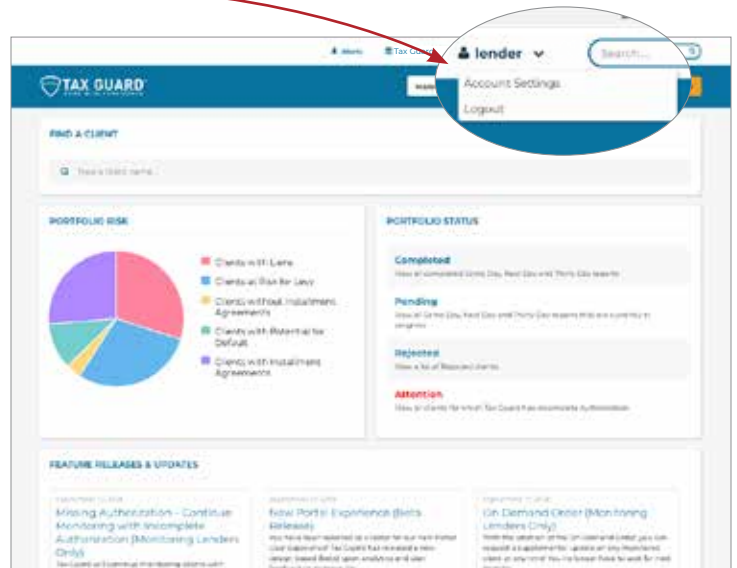
Tax Guard Portal
v. 2020

Login and Account Settings

The **Login** for the portal is at the top right of the Tax Guard home page.
www.tax-guard.com



Go to **Account Settings** to update your general information, password and notification settings.



The Portal Dashboard

Portfolio Risk

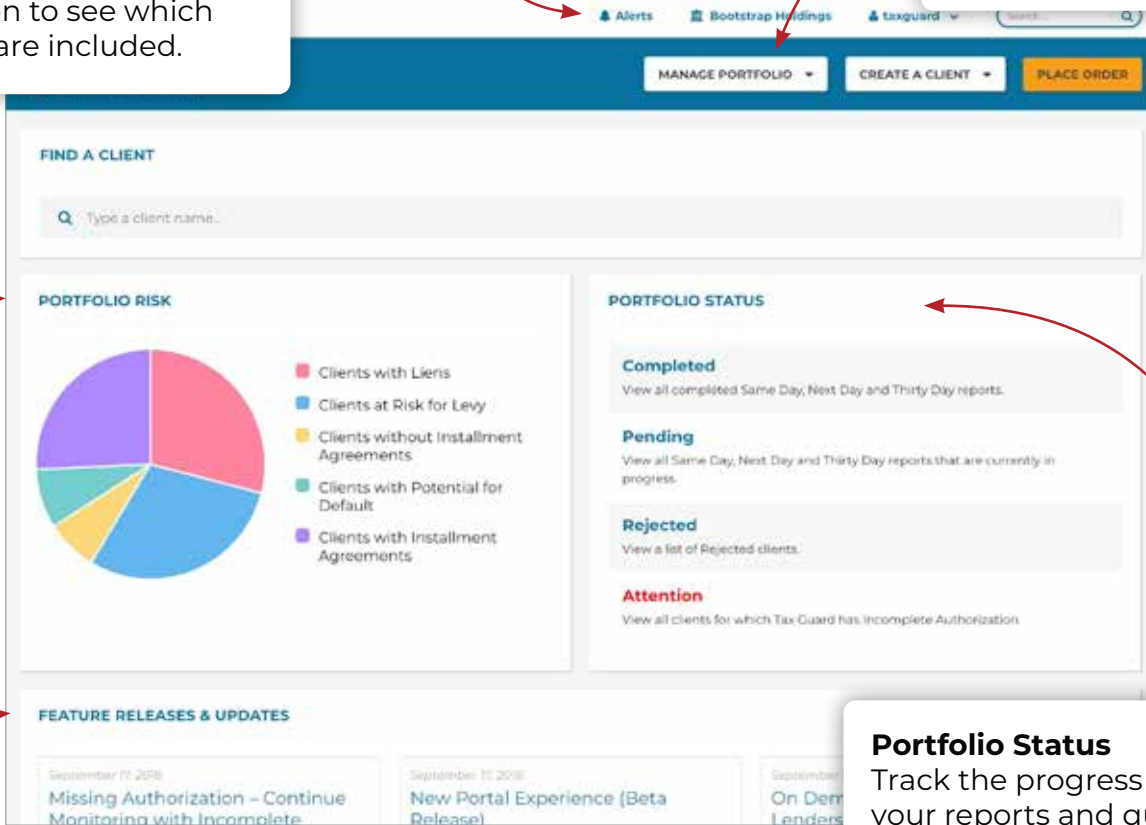
This easy to read chart summarizes your portfolio risk. Click on a section to see which clients are included.

Alerts Icon

Find all updates and alerts about your portfolio here. Click the icon to quickly navigate to the client and view alert details.

Manage Portfolio

Use this feature to explore your portfolio and see a breakdown of your monthly invoices.



Releases & Updates

Keep up-to-date on all of Tax Guard's new features, blog posts, and webinars.

Portfolio Status

Track the progress of your reports and quickly identify those that require your attention.

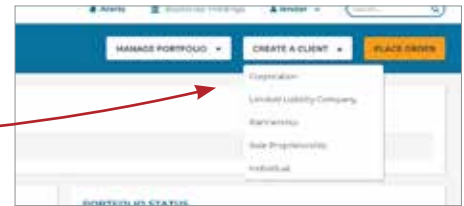


High Risk

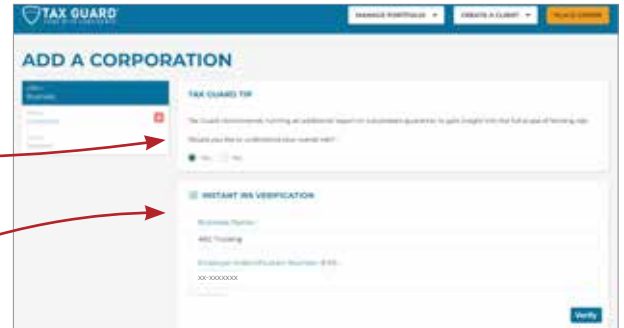
Customers that utilize the monitoring service will see a break down of high risk clients on the portal dashboard.

Create a New Client

Create A Client by selecting the entity type.

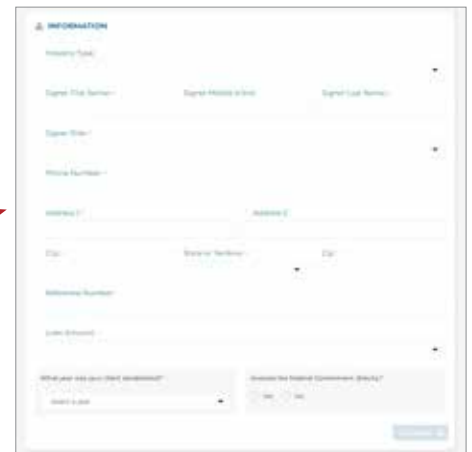


Link A Guarantor Report by checking yes in the Tax Guard Tip.

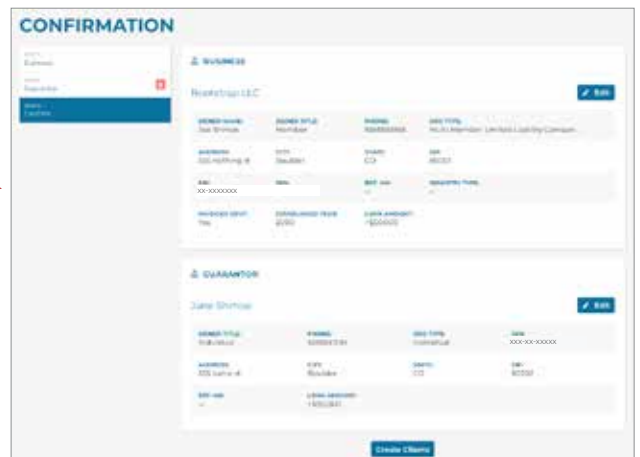


Instantly **Verify** the client's name and EIN and/or SSN using our ID Check feature.

i ID Check Results:
Success: The information you have provided matches IRS records.
Fail: The information you have provided does not match IRS records.
Error: The ID Check feature is unavailable. Please continue to the next step.



Input the remaining client information that will be used to generate Form 8821.



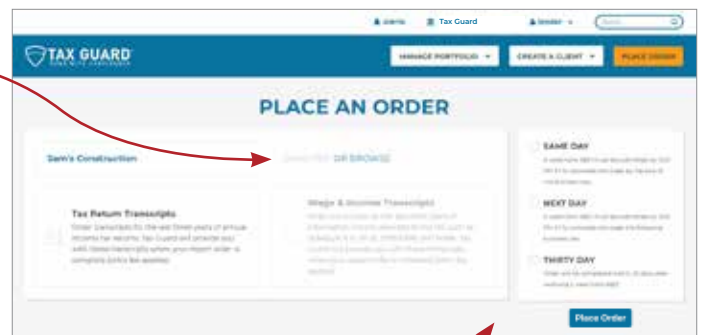
Once you have reviewed and/or edited the information, **Create Client(s)** and download the associated Form 8821.

Place an Order

Select **Place Order** and enter client name.



Upload the signed Form 8821.



Choose desired turn around time and add-ons, then **Place Order**.

i Once you've ordered a report, you can track its progress on the portal dashboard.