



Weber & Deegan, Ltd.

Certified Public Accountants

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www.weberdeegan.com

Welcome to the Weber and Deegan, Ltd. Secure Web Portals!

We hope you find this document helpful in getting started with our system. We have provided some screenshots to help you navigate your portal.

You are now able to view, print or save your tax returns at your convenience. We are currently working to integrate File Exchange and Web Tax Organizers to our portal system. If you wish to have access to these features and you currently do not, please contact cstrot@weberdeegan.com.

If you would like to view any tax returns in addition to your individual returns, business returns or family members' returns, please provide us with the names of such taxpayers. A signed authorization will be required, unless minor children. This form is included at the end of this document.

Portal Home Screen

1

2

1

2

1

Profile options (log out)

1 File Exchange Area: This is where you can upload files to private or shared file exchange folders

2 Client Folder: This is where you can access your Web Organizer, WD Engagement Letter, and filed tax returns.

File Exchange Area

Use Source Documents Folder for Tax Return Doc Submissions

NetClient CS

Documents

- File Exchange
- Mitchels, Mitch Tax Org

Home Up Remove Find:

Showing 3 of 3

Name	Size	Date Modified
Private		12/5/2014 11:17 AM
MM5555 File Exchange		12/5/2014 11:03 AM
Source Documents Upload		12/5/2014 11:06 AM

Client Folder

https://secure.netlinksolution.com/nextgen/go.html#/document-management/documents/3005129 Thomson Reuters (Tax & ...

NetClient CS > ...

File Edit View Favorites Tools Help

Convert Select Google Search More » Mike Carroll

Weber & Deegan, Ltd.
7211 Ohms Ln - Edina, MN 55439-2148

Home Messages Mitch Mitchels Help

NetClient CS

Documents

File Exchange

Mitchels, Mitch **1 Tax Org**

Mitchels, Mitch

Home Up Remove Download All Refresh

Find:

Showing 3 of 4 items

Name	Size	Date Modified
Engagement Letter 1		
Tax Returns		
Tax Organizer		

Please sign and return to WD

This is where you have access to filed tax returns

This is your Web Organizer. You may fill-out and submit online or print and manually fill-out.

Tax Organizer

Remember, you can only submit the organizer once. You may save and close to continue working at a later time.

https://secure.netlinksolution.com/nextgen/go.html#/tax/tax-organizer/form/cover_letter.jsp?folder=-2&folderUnit=-2&form=-2&formUnit=-2

Identified by GeoTrust

NetClient CS > T... x

File Edit View Favorites Tools Help

Convert Select

Google

Search

More >> Mike Carroll

Home Messages

Mitch Mitchels Help

Tax Organizer Index

Letter > Cover Letter

Send to Preparer

Save & Close

Create PDF

Last saved: 12/5/2014 11:01 AM

Uploaded Tax Documents

- Letter
- Questionnaire
- Notes
- General
- Electronic Filing
- Payments
- Income
- Itemized Deductions
- Credits

Weber & Deegan, Ltd.
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Edina, MN 55439
952-920-6186

Mitch Mit...

Dear Mitch:

This Tax Organizer is designed to help you gather the tax information needed to prepare your 2014 personal income tax return. To help you complete the organizer with minimal time and effort, when available, you will find certain information from your 2013 personal income tax return.

In your Tax Organizer, all social security numbers and bank account numbers have been replaced with asterisks (***-**-****) and (****1234) to protect your privacy and personal information. If you need to change or update a social security number or bank account information, please contact this office. Do not indicate the social security number or bank account change on your Tax Organizer. When you receive your completed tax return(s), please review all social security numbers and bank account information for accuracy. Report any discrepancies to this office immediately.

Enter 2014 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.

Please send us all of your original tax source documents, as well as any tax notices sent to you by the IRS or other taxing authority. If we did not prepare your prior

This is where you submit the organizer. You can only submit the organizer once. You may save and close to continue working at a later time.

You may attach documents to the organizer, but you can only send the organizer one time. To send files at any time, you may use the File Exchange Area found on the home screen

Weber & Deegan, Ltd.

3rd Party Web Portal Authorization

The security of your sensitive information is a primary concern at Weber & Deegan, Ltd. The portal is a web-based application easily accessed on our website, www.weberdeegan.com. The portal allows for the encrypted, bi-directional transmission and storage of electronic data. Weber & Deegan will use the portal to provide quick and easy access, 24/7, to your important financial documents. Once we reach full implementation, the application will also give you the ability to send large files to us through the portal.

I, _____, give _____ permission to access my sensitive tax or financial information via their secure web portal.

Signed, _____, on _____.
Date

Spouse name Signature Date