

## Client Portal Instructions

1. Visit our website:

<http://www.pennoptic.com>

Click on RESOURCES then Client Portal

\*You can bookmark this page on your web browser for easier access in the future

2. Login Information:

### **Pennoptic CPAs and Strategic Partners LLC**

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# Welcome Back

Enter your details to log in securely. 

Primary Contact's E-mail

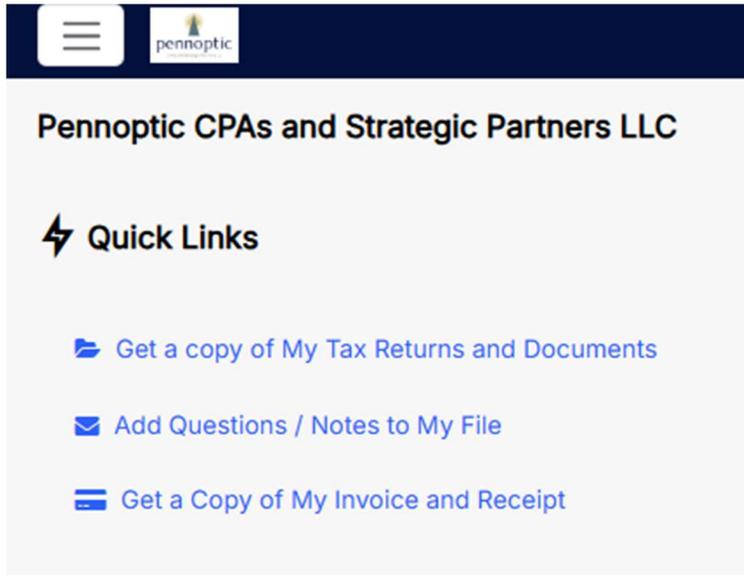
Password

[Need a Password or Forgot Password?](#)

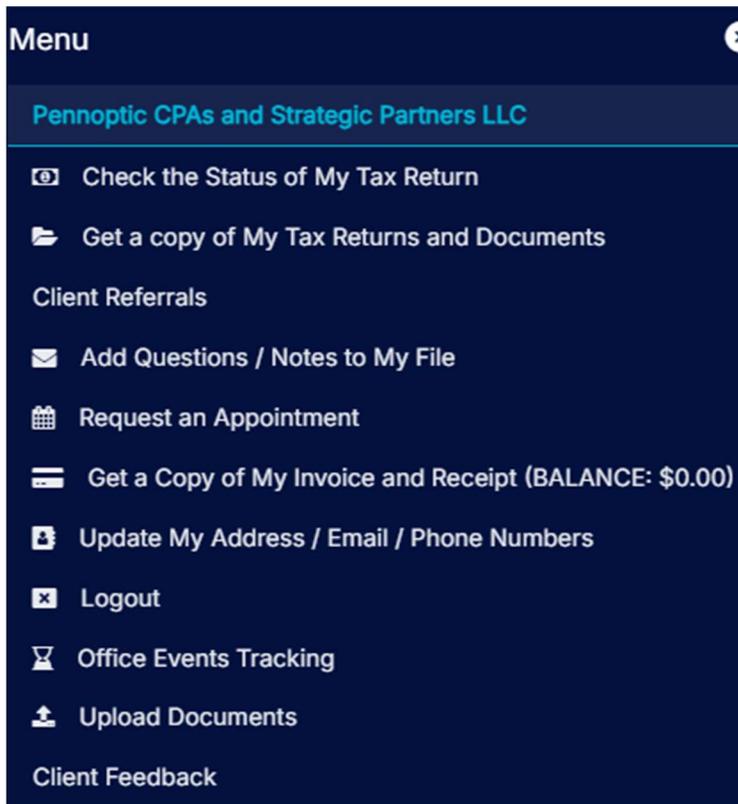
Enter E-mail and Password. If you forgot or do not have click on Need a Password or Forgot Password. This will allow you to reset your password or set up a new account.

(If you have your individual & business taxes done here, we will link the accounts, so you will be able to access your business portal by logging in to your personal portal.)

Once you have logged in you will see the following menu:



Click the menu link (the three lines in above picture) and choose from the drop-down menu below:



Any questions please feel free to to call our offices for assistance