

The Client Document Portal

Dear Client.

In an effort to make documents more accessible to our clients, we are introducing the **Client Document Portal**. You may now retrieve or send documents to this portal with the advantage of instant access to your tax return as well as other documentation and thereby speeding the completion of your tax return.

The portal is a highly secure web based server where all client documents can be exchanged between the client and Lexington Financial. Security is always a concern to Lexington Financial and our clients but be assured that we take the utmost care for the protection of your data.*

The portal is easy, intuitive and an efficient method to retrieve your documents. If you have any questions, please do not hesitate to contact us and we will be happy to guide you through the process.

Documents To Be Available

There are two kinds of documents on the portal; client documents (your documents) and Public documents. Client documents are documents that you and only you can see, access, and retrieve. Public documents are documents that everyone can see, access, and retrieve.

Portal Use Instructions

1. Go to the Lexington Financial Website at <http://www.lexington-finance.com>.
2. On the left side, click on **Client Center**.
3. At the top of the page, click the **Client Document Portal** button.
4. This brings you to the logon screen for the Portal. Enter your **email address** and **password**. You must use the email address we have on file for you (it can be changed later). The password is your zip code + the last 4 digits of your social security number.
5. After logging on, click the **Secure file Exchange** icon.
6. Your documents are displayed. To view or download a document, click on the **document** you want and the File Download window will display.
7. To view the document, click "**Open**". To save the document to your hard drive, click "**Save**".
8. You may upload a document to your portal so Lexington Financial can retrieve it. The tax questionnaire is an example of such a document. You would download it, fill it in and then upload the completed document to the portal. To upload a document, click on the **Upload** button located on the left side of the tool bar at the top of the page
 - Navigate to where the document is on your hard drive.
 - Highlight the document and click the **Open** button.
 - Click the **Upload** button.
9. To retrieve documents that are accessible by everyone (*Public documents*), click on the **home** button at the top left of the page.
10. Click on "**Public Documents**".
11. Follow Instructions above for Items 7 and 8.

* All documents are protected with 14 full layers of security built into the portal. The portal is SAS 70 Type II certified which means that the portal has sufficient processes, controls, and safeguards to keep your data safe from theft, corruption or mishandling.