PPL Organizer Instructions

Notification email: notifications@pplcpa.clientportal.com

1) **Click "Start the Organizer"**

Emily Calkins has sent you an organizer to complete Inbox ×

PPL CPA <notifications@pplcpa.clientportal.com>
to me

PPL
Certified Public Accountants
pplcpa.com

Action Required

Client: John Doe

Hi Emily,

To better serve you, we need you to do two things:

1. Answer some tax-related questions
2. Upload your tax documents

We'll walk you through each step, and please include any questions or concerns in the areas for comments.

Please log in to complete the organizer.

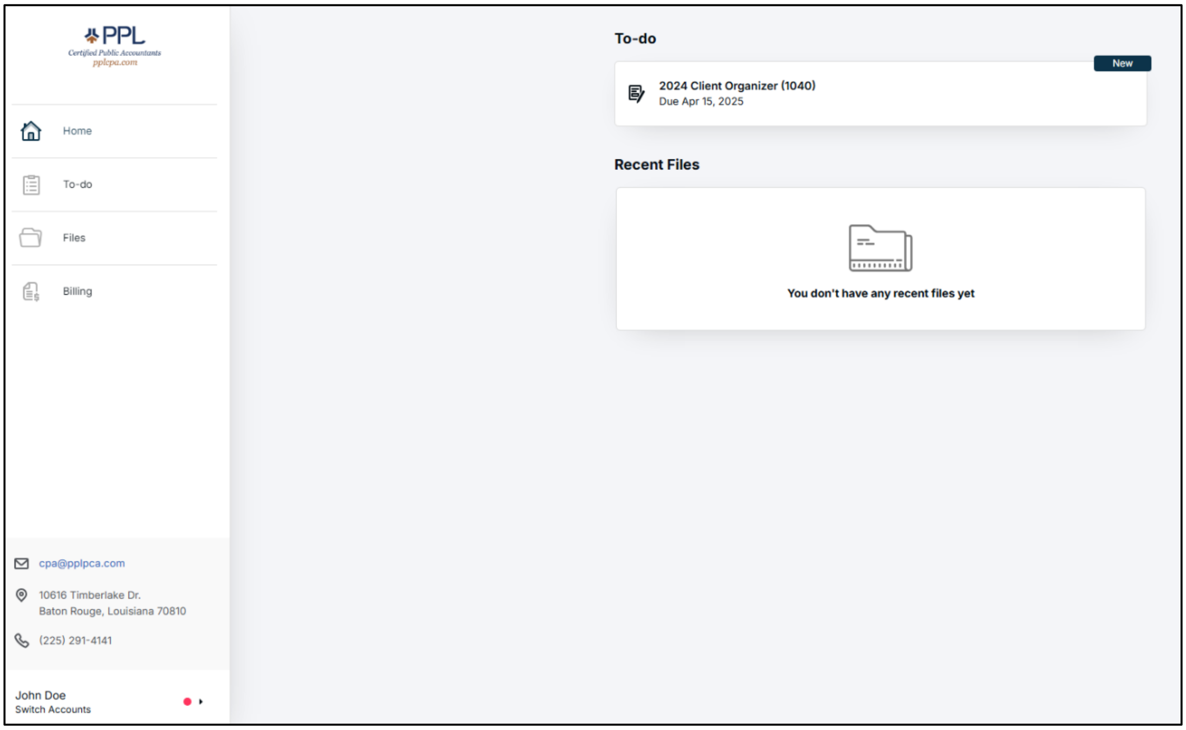
Start the organizer

PPL CPA

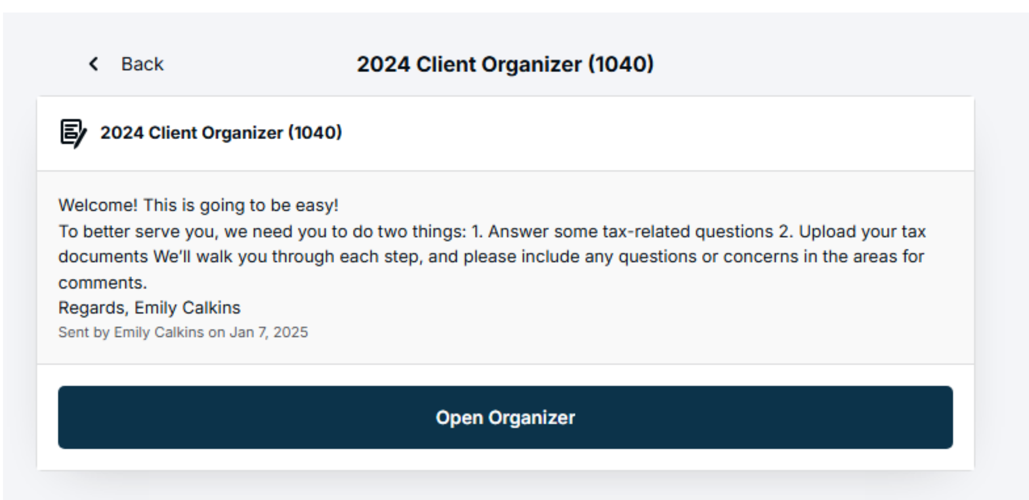
2) **Once logged into the portal, you should see the 2024 Client Organizer in the To-Do section.**

Click the To-do to access the Organizer.

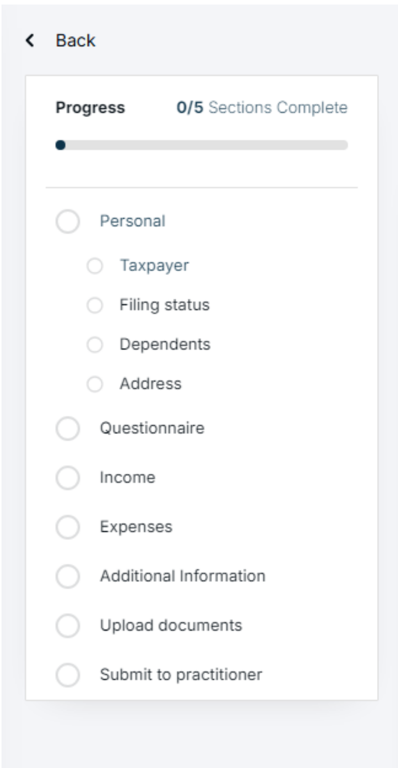
Note: If you have multiple accounts, you can toggle between them using the Switch Account feature in the bottom left corner.

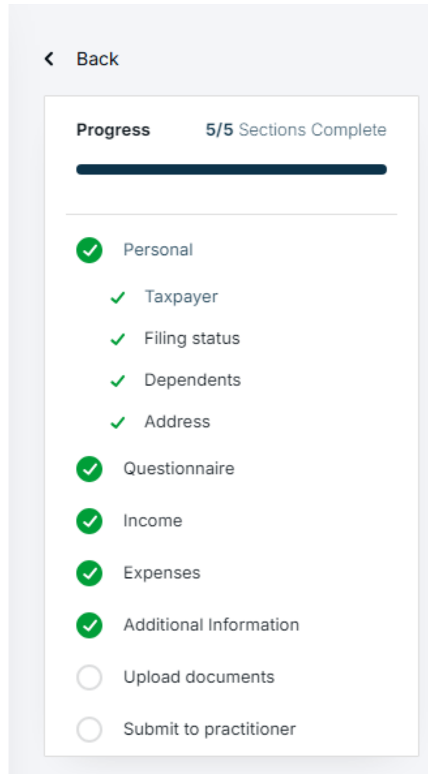


3) **Click "Open Organizer"**

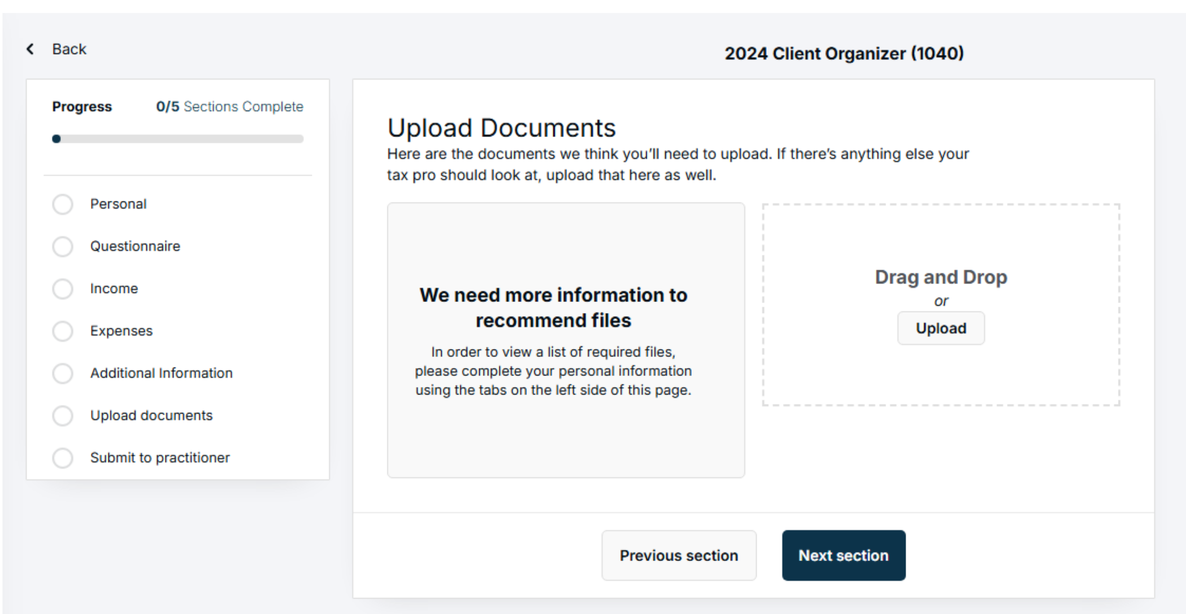


4) The Organizer will track your status as you complete it. The first 5 sections are the survey.

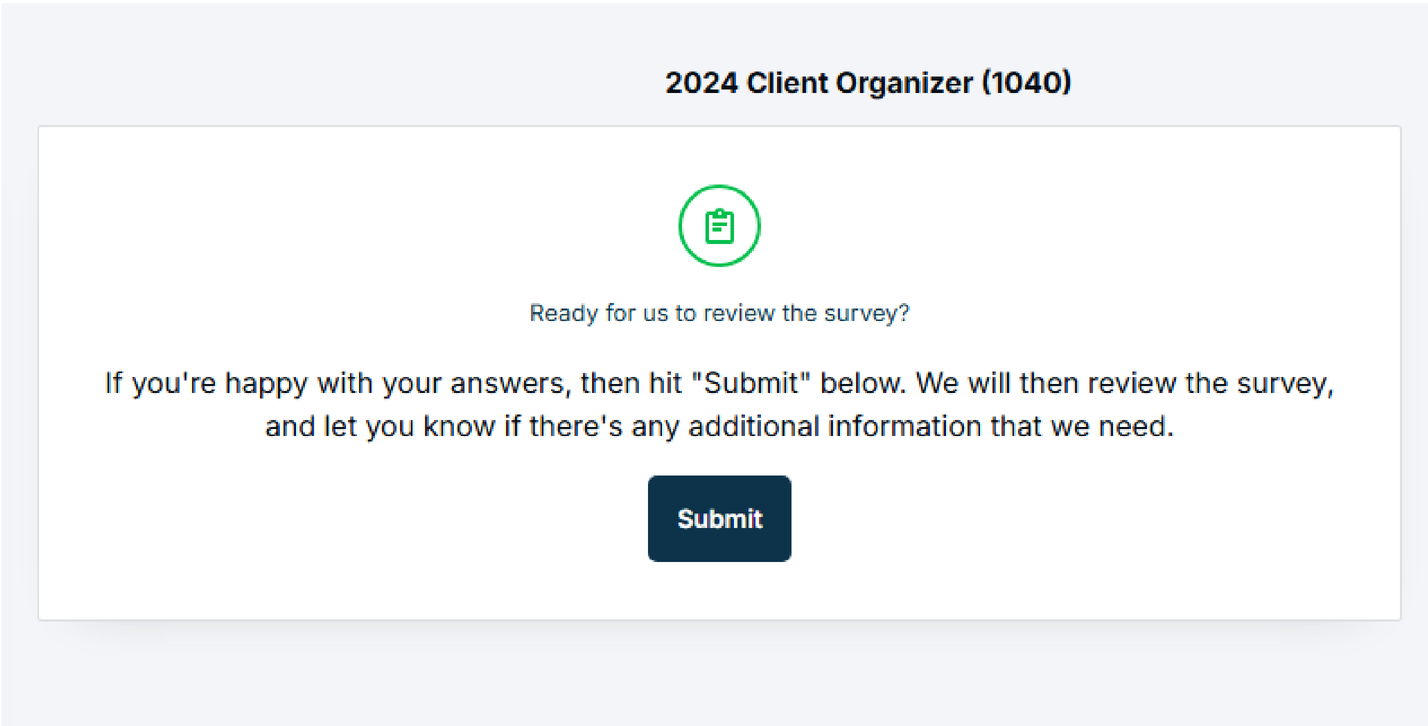




5) The 6th section is for document uploads. Based on your answers in the previous 5 sections, you may have a list of suggested documents here. Please upload whatever you have and be aware that you can always upload additional documents even after the Organizer has been submitted.



6) **The 7th section is "Submit to practitioner".**
   Please make sure to submit your Organizer so that we receive the notification that you have provided your information.



As always, please reach out if you have any questions or need assistance.