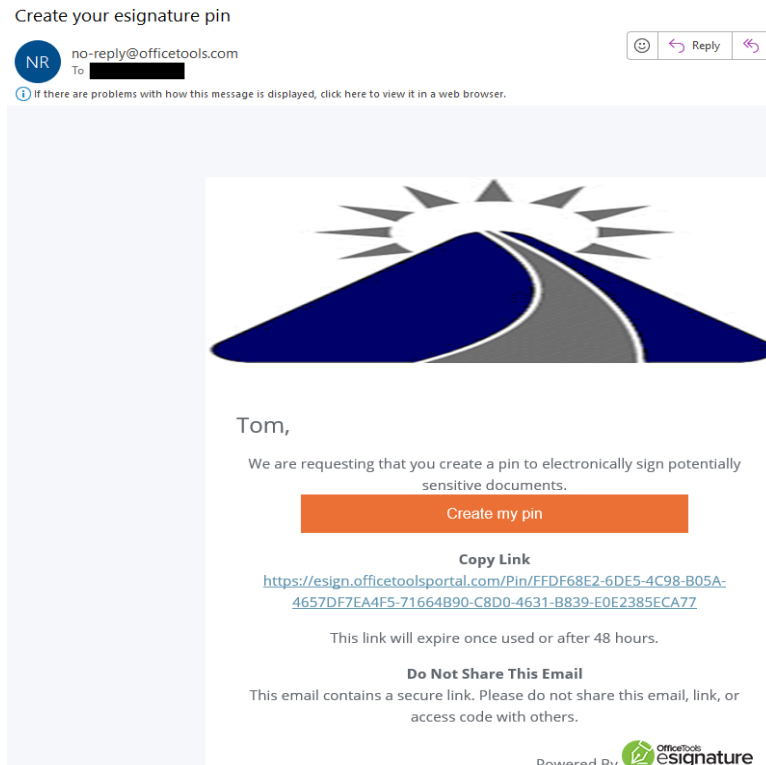


Creating a Pin

- The first time you are sent a document to sign electronically, you will get an initial email from no-reply@firmportal.com to create a pin. Click the “Create my pin” button in the email.



- Enter the requested information in the boxes. Please be sure to save this pin somewhere for future use.

OfficeTools eSignature

Pin Setup

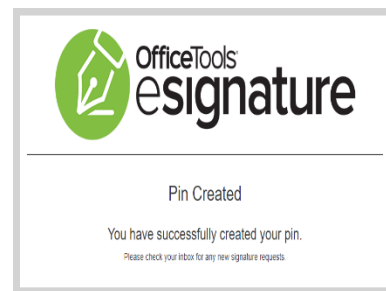
Please enter the corresponding information below.

Email:

First Name: **Last Name:**

4 Digit Pin: **Verify Pin:**

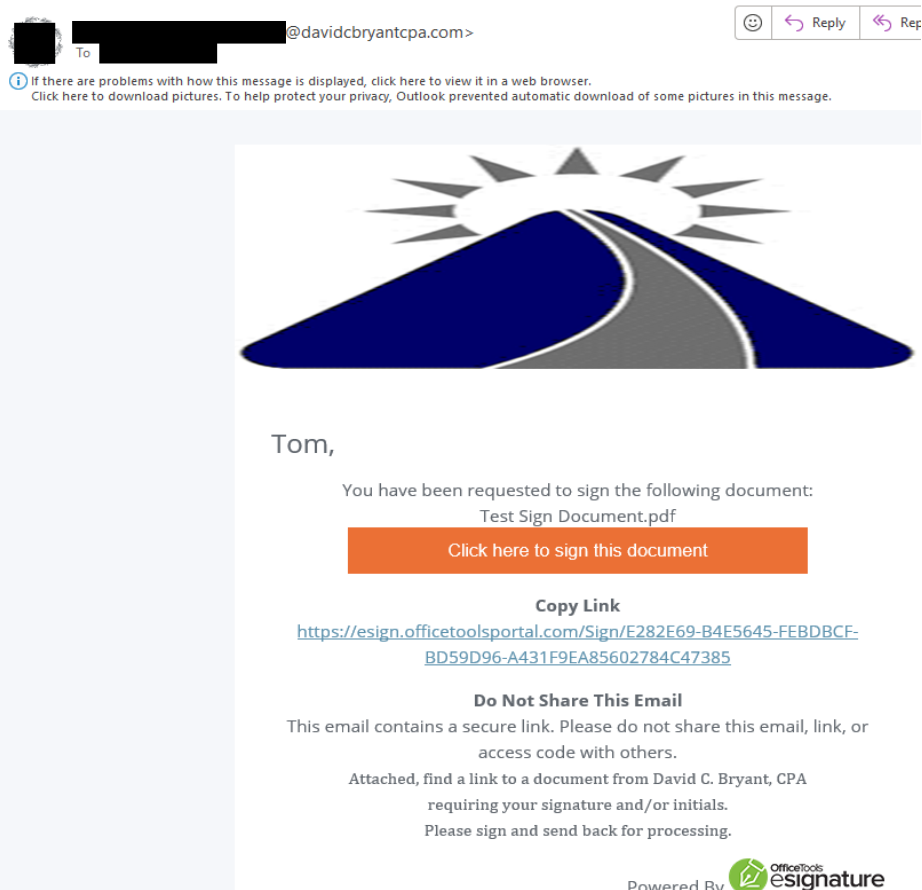
[Submit](#)



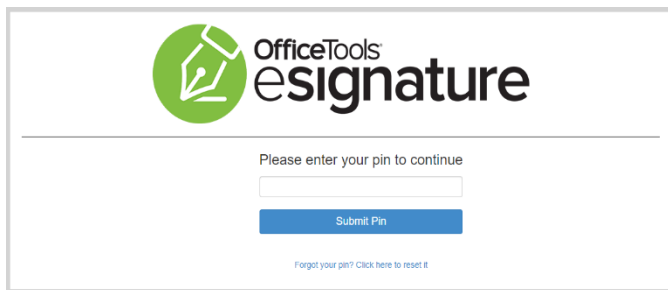
Signing a Document

- You will receive an email when you have a document to electronically sign. It will come from one of our staff members' email addresses. Please select the orange "Click here" button.

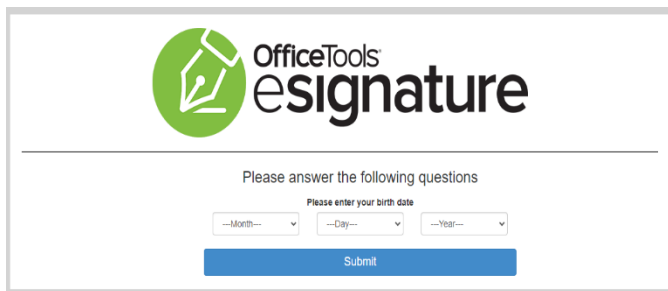
Please Sign [Test Sign Document.pdf]



- Before proceeding, you will be prompted for your pin. If you have forgotten your pin, click the button to reset it.

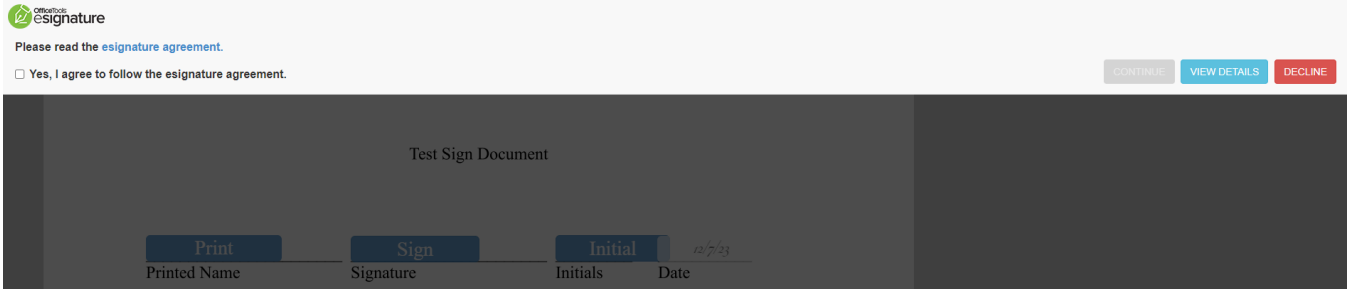


- If the document you are signing must meet IRS compliance, you will be prompted for your date of birth, or another similar security question. If you cannot move past this step, please give our office a call.

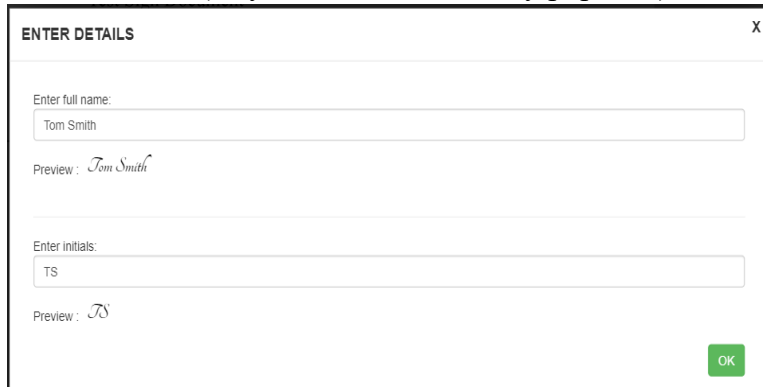


David C. Bryant, CPA – E-Signature Instructions

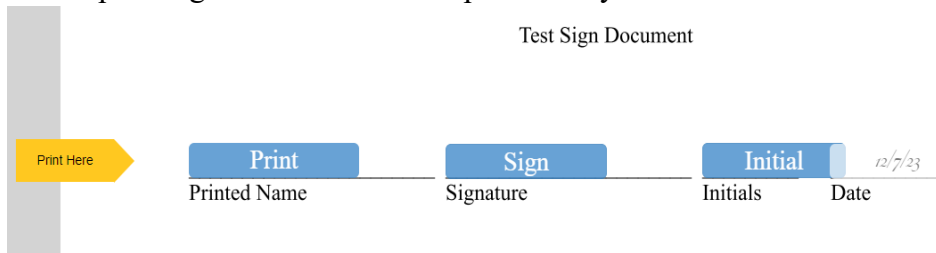
- Once you have successfully verified your identity, you will get to the signature screen. You must first agree to the signature agreement. You need to check the box AND select the green “Continue” button.



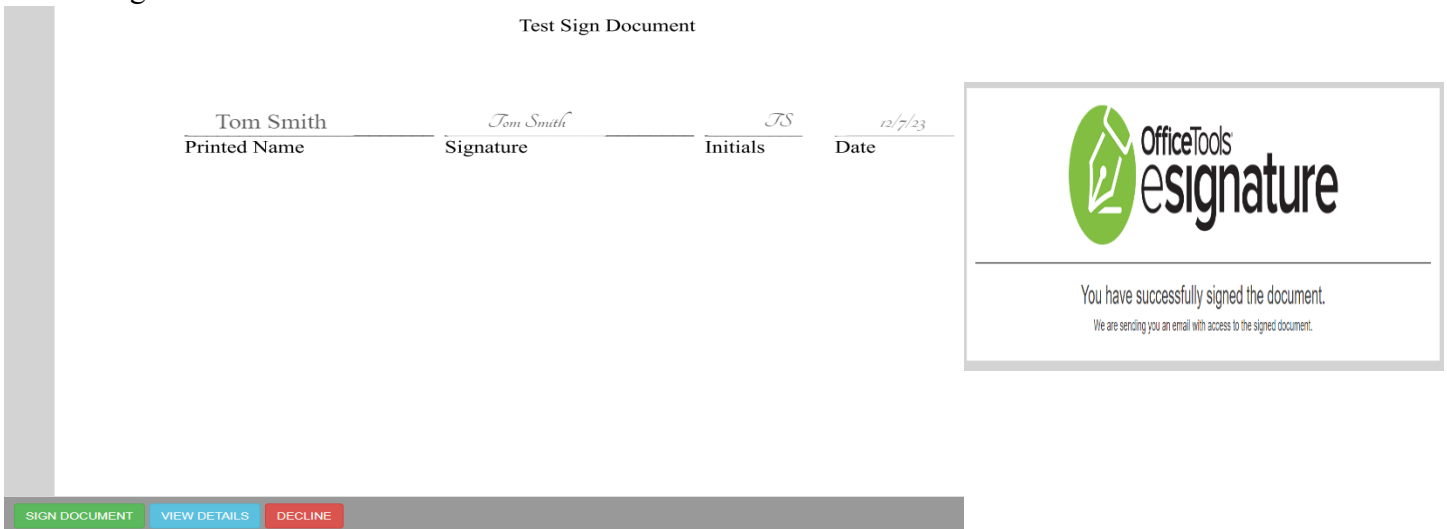
- Enter the details requested, if needed (they should automatically populate). Press the green “OK” button.



- You will now click to print/sign/initial all needed spaces. They will be marked with blue rectangles.

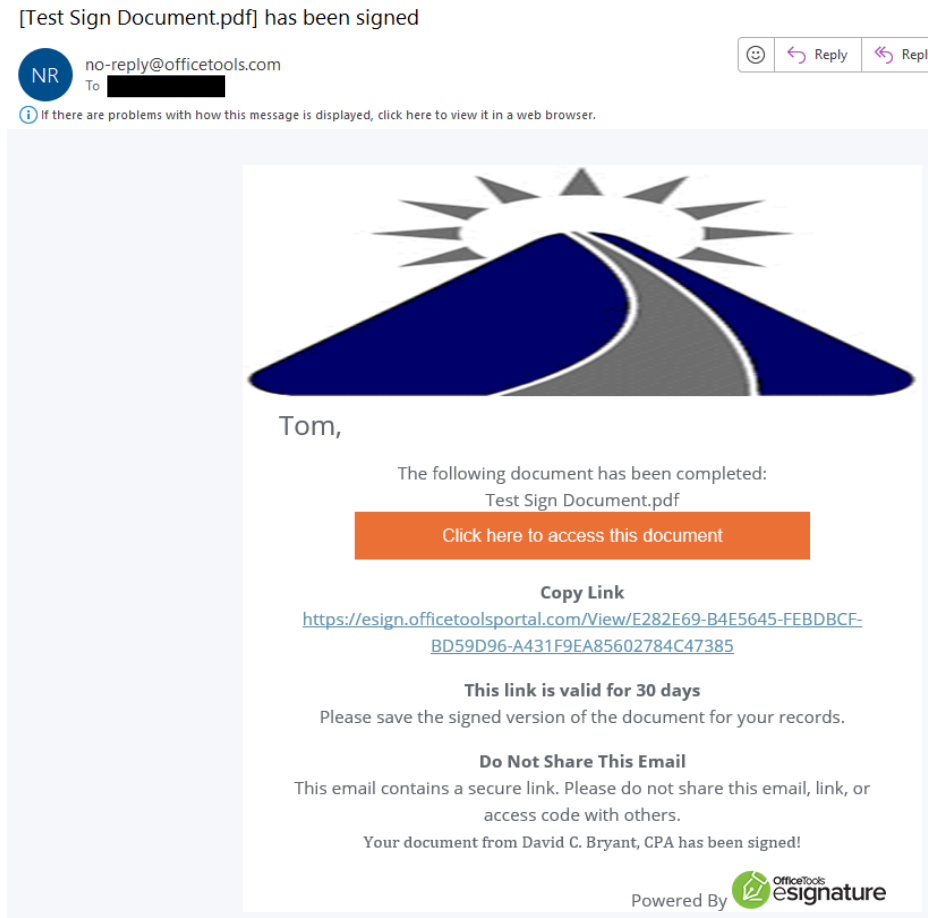


- Once all fields have been completed, you will see a green “Sign Document” button in the bottom left corner. You must click the button to complete the signing process. You will then receive a successfully signed message.



David C. Bryant, CPA – E-Signature Instructions

- You will receive another email from no-reply@officetools.com that gives you access to the signed document.



- **PLEASE NOTE:**
 - **If more than one person needs to sign the document (i.e. tax return signature pages for a joint return) you/the other party will receive a SECOND email to complete the signing process under their name. The document will NOT be considered complete until all parties have completed the signing process.**