



Accounting Services
 Business Consulting
 Tax Planning & Preparation
 Financial Planning

Alan McSwain, CPA
 alan@michamcpa.com
 Benjamin Micham, CPA, CFP
 ben@michamcpa.com

A Member of the American Institute and the North Carolina Association of Certified Public Accountants

SHAREFILE PORTAL CONSENT FORM

Name of Individual/Business: _____

Person(s) Assigned Portal Access Privileges:

<u>Name</u>	<u>Email Address</u>	<u>Restricted Access?</u> <u>(Y/N)*</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Answer "Yes" under Restricted Access if an individual should not have access to all documents placed in this portal. We will contact you to get details for anyone with restricted access.*

Please answer one of the security questions below in the event we need to verify your identity.

In which town were you born? _____

What was the name of your first pet? _____

What is your mother's maiden name? _____

What is your father's middle name? _____

By signing below:

1. You authorize Micham & McSwain, CPAs to establish a ShareFile portal for the above named client;
2. You authorize Micham & McSwain, CPAs to provide access to the portal to the above named individuals;
3. You agree to change your password immediately and notify Micham & McSwain, CPAs in writing should any individual(s) cease to be permitted access to your ShareFile portal;
4. You agree to accept delivery of tax returns, financial statements, and/or other sensitive personal or business documents containing personally identifiable information through the ShareFile portal.

Accepted and Agreed By:

 Signature (Must be an officer if business)

 Date

 Printed Name

 Phone #