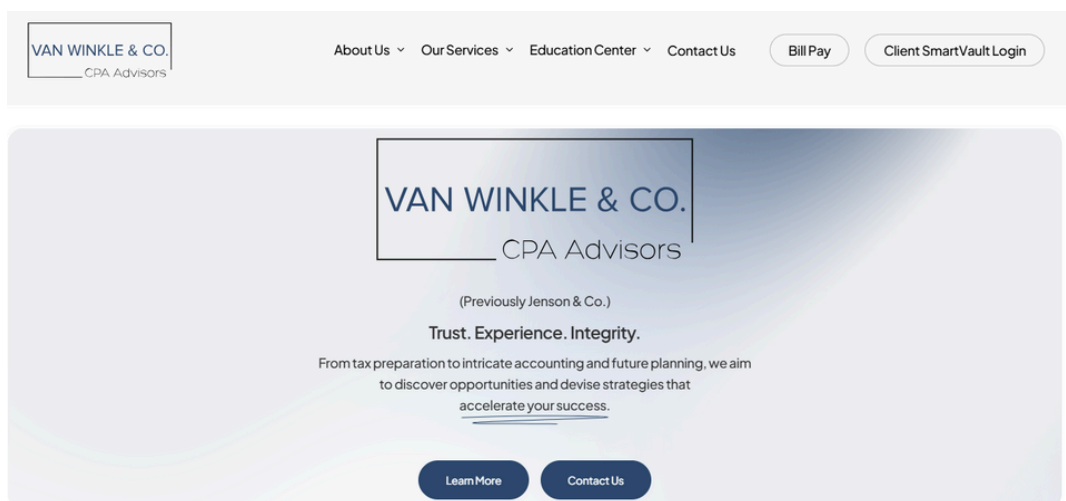


# SmartVault Guide

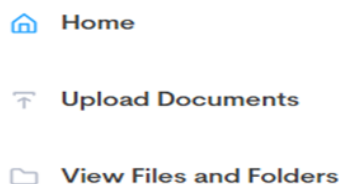
VAN WINKLE & CO.  
CPA Advisors

[www.VanWinkleCPAs.com](http://www.VanWinkleCPAs.com)




- Access your secure online portal, by going to the VanWinkleCPAs.com website and clicking on “Client SmartVault Login” in the upper right corner.



- Enter Your Login Credentials.
- After you enter your credentials, you will see this screen.



- Access your Tax Organizer by clicking on “View Files and Folders”
- Select the name of the Tax Organizer you are looking for.
- Select the Year.
- View your tax organizer here.

<input type="checkbox"/>	 Tax Returns	Sep 3 2024
<input type="checkbox"/>	 Upload to Van Winkle & Co	Sep 3 2024
<input type="checkbox"/>	 2024 Individual TISLA (Tiscareno, Lauren) Organizer.pdf	Jan 6 2025

## Previous Returns?

- Select “Tax Return”.
- Select year.

## Document Uploads

- On the home page, you will see two places to access uploads.



### Secure Document Upload

You can securely upload any of your documents with ease.

[Upload a Document](#)



### All Your Documents, One Place

Revisit your uploaded documents anytime. Keep track of your document history and review them whenever needed.

[View Your Documents](#)

- Choose to upload to the current years upload folder or select “view all folders” to select your year.

Upload your files to the folders relevant to the current or prior year engagements.

[View All Folders](#)

Year	Name	Folder Location
2024	 Upload to Van Winkle & Co Tiscareno, Lauren A	Tiscareno, Lauren A / 2024



Any questions with SmartVault, please contact  
Lauren@vanwinklecpas.com or call 763.425.5000x0