Get to know your

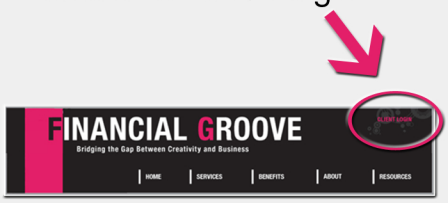
Financial Groove Portal

✔ Access your Tax Return Anytime

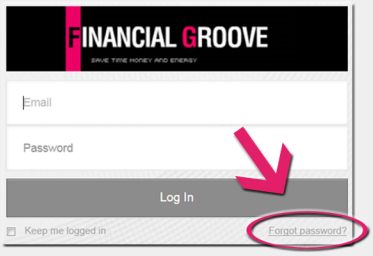
As a Financial Groove client, you have instant access to your tax return easily and securely.
You never need to call for a copy! It is always at your finger tips.

1. Visit www.FinancialGroove.com

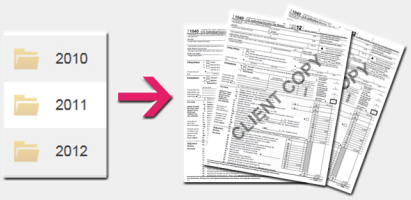
2. Click 'Client Login'



3. Set your own password by clicking 'Forgot Password'



4. Login to view, download, or print your files whenever you'd like.



The IRS encourages taxpayers to safeguard tax and financial records with paperless recordkeeping.

✔ Take Advantage of your Secure Storage

A home for your tax records with instant access…
Now you have a home for your **important life documents** as well!
Just ask! We can scan your vital docs into your FG portal.
Up to 20 documents are covered as a benefit for Financial Groove Clients at *no additional charge*.

Important Life Documents List:

- Social Secuirty Cards
- Passports
- Birth Certificates
- Marriage Licenses

- Divorce Decrees
- Deeds and Titles
- Military Service Records
- Investment Certificates

- Wills
- Loan Documents
- Life Insurance Policies
- Home purchase and Improvement Records

If you ever get in a bind and need your important documents, Financial Groove has them for you securely in your online account. Available anytime from anywhere!

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