



Getting started with the Client Portal/Smart Vault

Accounting firms invite their clients to access important tax forms in their Client Portal/Smart Vault as a user. This ensures that the accounting firm has your up to date email, contact information and for security.

Note: In order to activate your account and access your Client Portal/Smart Vault, you must have your accountant invite you. If you have not received this invitation email, reach out to Baer Tax Group via email with your email and phone contact information and ask for Client Portal Access.

Create Your Personal Secure Account, Sign-In and Share Documents.

After you receive your email invitation you can activate your access as instructed below.

1. Open your activation email from Baer Tax Group/ Smart Vault.
2. Click Activation Link.
3. Enter your cell phone number and create a password.

Note: The rest of your information is already entered by default.

4. Click Create My User.

IMPORTANT- remember your password and keep it in a safe place. Your email address will be your log in name.

Signing into your portal

Once you have created your account as noted above, you will go to the sign in page and enter your email and password. For added security you will also need to enter a verification code that will be sent to your log in email each time you sign in. You will find the sign in link for the Client Portal tab on the Baer Tax Group website.

Sign In
Sign in to your SmartVault account below

Email Address
accountingsv@smartvault.com

Password

Remember email

[Can't sign in?](#)

If you have forgotten your password, you will click the “Can’t sign in?” button at the bottom of the sign in page. Smart Vault will guide you through steps to create a new password.

PLEASE NOTE- For security Baer Tax Group does not have access to OR the ability to re-set your password.

Sharing and accessing documents/ tax returns in your portal.

To Upload(share) your documents:

1. Click the Upload Documents in the top left corner of the screen.
2. Select the Client Tax Supporting Document Year folder. Remember, Tax Year (not Calendar Year) that you are uploading.
3. Drag and drop the file you want to share or click “browse” to find the document on your computer you want to share.
4. You are finished. Baer Tax Group is automatically notified of your upload/share.

Accessing Tax Returns:

1. Click on the appropriate Tax Year
2. Click on Client Tax Return folder
3. Click the tax Return file in the folder to view the return
4. Option to download/save the document to your computer by clicking the Download button at the top right corner.

Resource Forms:

Forms for personal and business taxes are located under the Client Resource Forms folder

There are sub folders for ease of access to forms that apply to your specific tax situation

You can open these files, download them, fill them out on your computer and then Share/Upload