

PORTAL INSTRUCTIONS

1. If you are a new client and do not yet have a portal:

- Contact our office at 314-446-0425 or office@itaxstl.com and request portal activation.
- You will receive a link to set up your account: Complete password creation page.

Create Password

User Name

Last 4 of SSN

SSN is required

Password

Confirm Password

Minimum 8 Characters

Submit

c. Update your profile information

Profile

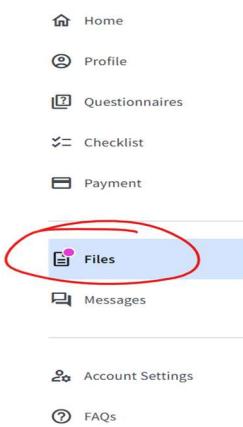
Update & Confirm Your Information

Review and update anything incorrect or missing. Click the confirm button below when finished.

Your Info	Edit
No taxpayer information	
Address	
No address provided	
Spouse Info	
No spouse information	
Dependents	
No dependents	

Confirm Profile

d. Navigate to "files"



If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4488 or by email at complaints@tigta.treas.gov.

- e. This is where you can download files from your preparer or scroll down to the bottom of the page and upload documents to your preparer. This is where you will find your completed tax returns and upload your tax documents.

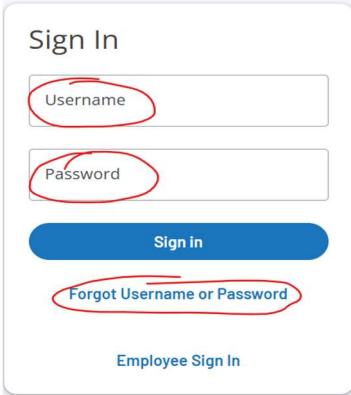
2. If you are an existing client:

- a. Navigate to our website at www.itaxstl.com
- b. Click on the “portal” button in the upper right corner

Contact Us
[Schedule Appointment](#)
 314.446.0425
 office@itaxstl.com



- c. Log in using the email of the primary taxpayer and the password you created when you activated your account. If you forgot your username or password, use the “forgot username or password” link to reset it. We do not have the ability to access or reset your password on our end.



- d. Navigate to “files” where you can upload your tax docs and receive your completed return.

