

To: All Clients

From: Moshe Klein

Re: Document Sharing / Secure File Set Up - **REQUIRED**

In the course of providing professional services, Accountants, Bookkeepers and Tax Professionals need to gather many pieces of sensitive, personal information from clients. This includes financial information, tax identification numbers, financial account numbers, and other crucial financial data. If unauthorized third parties obtained this data, they could cause damage to the client ranging from simple embarrassment to identity theft.

Therefore, it is critical for Moshe Klein & Associates, Ltd. to maintain control over the transfer of data to assure that our client's confidential information is not compromised. Technological advances have expanded the options for electronic data transfer, which is what I am writing to you about today.

Our firm has set up a new and very user friendly system for sharing confidential and sensitive information with our clients and to afford our clients a safe and easy way to upload and share information with the firm.

There is no cost to you to set up a document sharing secure file and the process is simple and quick. All clients must have a secure file document sharing account set up to transmit sensitive documents to MKA and for MKA to send and store confidential information for you the client. MKA will NOT be responsible for confidential information sent via email or email attachment by a client or perspective client. MKA will NOT transmit sensitive or confidential documents to clients or perspective clients via email or email attachment. MKA will only use the secure file document sharing account system for document sharing purposes.

To set up your secure file document sharing account immediately, please provide us with the following information by fax 773-733-4967 or call the office 888-432-8187

Legal Name (exact spelling)

- **Business** (as it is printed on the Articles of Incorporation)
- **Individual** (first name, middle name, last name)

Email Address

- For the person who will be accessing the secure file account

ID Number

- **Business** (Federal tax ID #)
- **Individual** (Social security number for primary tax payer)

Tax Return Type

- **Select one:** 1040; 1120; 1120S; 1065; 1041; 990