



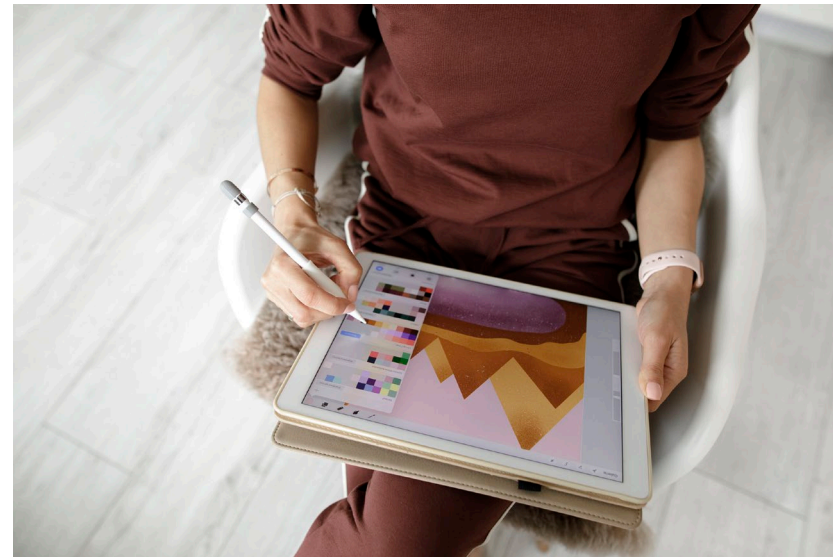
**Detailed instructions for New Portal
for Business, Non-profit, or Trust**

Welcome to our new Portal with Soraban <https://app.soraban.com>.

OR go to our website www.RelieveFinancialStress.com.

Click on **Portal/**[Login New Portal Account](#)

- User friendly
- May use on any electronic device, ie. laptop, phone, Ipad...etc.
- E-sign capability for Tax Return



STEP 1: Receive email from Minert & Associates, PLLC

Please Complete 2023 Business Tax Organizer

The screenshot shows an email client interface. At the top, there are tabs for 'Focused' and 'Other'. Below the tabs is a header row with columns for 'From' and 'Subject', and a 'Received' column with a dropdown arrow. A 'Today' group is expanded, showing one email entry. The email is from 'Minert & Associ...' with the subject 'Please complete 2023 Business Tax Organizer 2023 for Footsteps to Freedom' and was received on 'Wed 1/31/2024 11:03 AM'. Below the email list, there is a summary bar for the sender 'Minert & Associates, PLLC' with a star icon, and the subject 'Please complete 2023 Business Tax Organizer 2023 for Footsteps to Freedom' followed by a preview snippet: 'Hi Footsteps to Freedom! Minert & Associates, PLLC is invitin...'

*Be sure to check your Spam folder

STEP 2: Open Email

When you open the email, it will look something like this: Scroll to the bottom and click on Open Questionnaire



Hi Stephanie,

Minert & Associates, PLLC is inviting you complete the **2023 Business Tax Organizer**.

Accessing Your Portal Account:

- Click on the Button Below to Begin – **Open Questionnaire**
- Create a password.
- Access your Tax Organizer or portal account at any time by visiting <https://app.soraban.com> and enter your email & password.

Components of Tax Organizer

Introduction – Scroll to the bottom & Click **Next** to complete this section of the Tax Organizer

Engagement Letter – Review, type in signature, and then click **Sign** at the bottom of the page.

Tax Questionnaire – Complete General Information and Financial Statements

Document Upload – Upload your tax documents to your portal while completing the Tax Organizer.

Document Checklist – Review all of your tax documents to be uploaded when Tax Organizer is submitted.

Submit Tax Organizer & Tax Documents – Once the Tax Organizer is complete, you'll click the **I Agree** button & then click **Submit Answers**.

If you have any technical problems with the website or the Tax Organizer, please email us at admin@minertcpas.com or call at 918-742-1616.

Click the Button Below to Begin!

Open Questionnaire

STEP 3: Start Completing Tax Organizer

Introduction – Review Instructions for completing the Tax Organizer

< Back to Dashboard

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- Introduction
- Engagement Letter
- General Information
- Foreign Country Information
- Dependents
- Purchases, Sales, Debt, & Income
- Foreign Income
- Retirement Information
- Education Information
- Health Care Information
- Itemized Deductions
- Miscellaneous Information
- Additional Information
- ✓ Document Checklist
- Review & Submit

2023 Recurring Client 2023 Tax Organizer OS

*You don't have to complete the **Tax Organizer** in one sitting. It saves your work as you go.
Basic instructions below for completing Tax Organizer or click on [link](#) for **detailed instructions**.

[Access Our PDF For Instructions](#)

Engagement Letter

***Taxpayer only:** review, type in your full name, and then you must click **Sign** at the bottom of the page. Only one signature required.

Tax Questionnaire

Starting at the beginning of the General Information Section it says, "Please complete all questions."

Please complete all questions.

*** Required**

All questions with a **red star *** at the end are required to be answered.

Document Upload

Throughout the Tax Organizer there will be requests for you to Upload your tax documents. You will be prompted by an Upload button. Which will open a box for you drag & drop files into & then click upload all.

Upload

Document Checklist

Review all of your documents to be uploaded when Tax Organizer is submitted.

Review & Submit

When a section is complete there will be a green check mark by that section. Also, in the Review & Submit section, it will show when a section is complete. When all sections are complete, check the **I Agree** box at the bottom of the page and then click **Submit Answers**.

***FYI: Don't have to complete Tax Organizer in one sitting. It saves your work as you go.**

Scroll to the bottom and Click **Next to complete this section of the Tax Organizer.**

Next

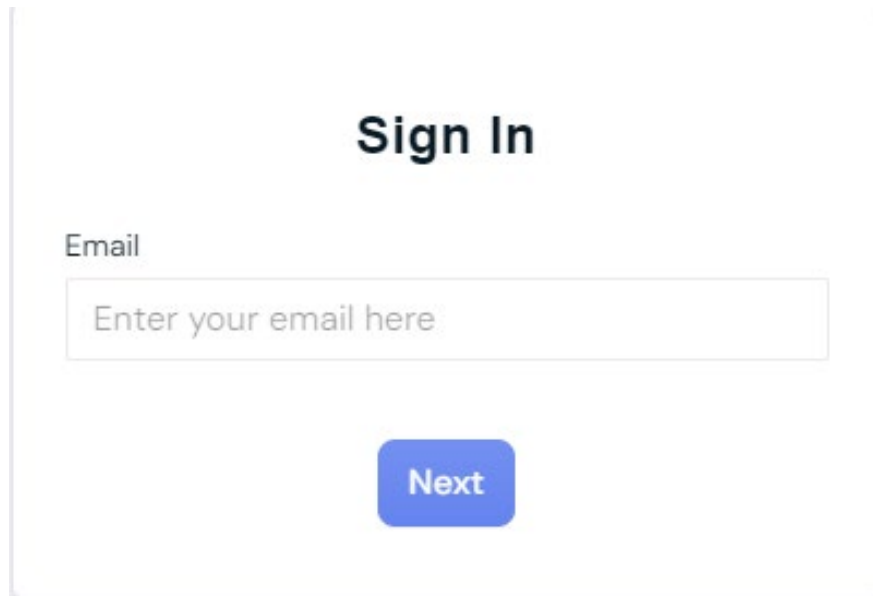
OR Go directly to your portal through link <https://app.soraban.com>.

OR go to our website www.RelieveFinancialStress.com.

Click on **Portal**/Login New Portal Account

Sign In page: Enter your email.

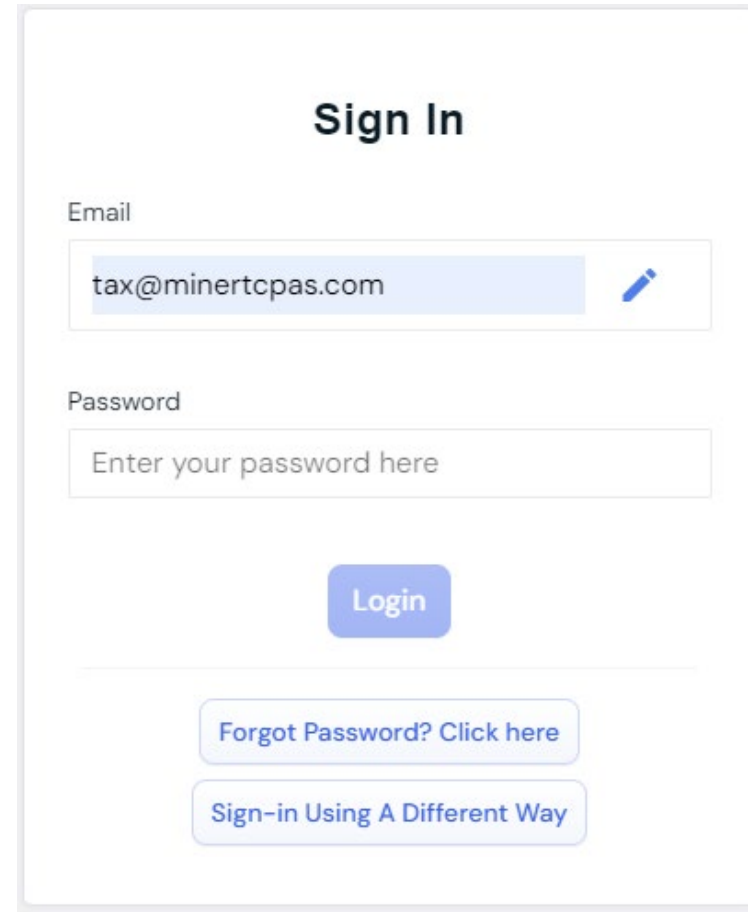
Enter your password.



Sign In


Email

Next



Sign In

Email

Password


Login

[Forgot Password? Click here](#)

[Sign-in Using A Different Way](#)

Choose your Entity

Select Entity to View

 Please note that each entity has its own dashboard, questionnaires and documents.

- Minert & Associates
Partnership >
- Footsteps to Freedom
Non Profit >
- Minert, Joshua
Individual >
- Minert, Tax and Stephanie
Individual >

It takes you to your entity's dashboard.

Current Entity: **Footsteps to Freedom** [Switch Entity](#)

Welcome, Tax Minert!

[Dashboard](#) [Documents](#) [Profile](#)

2023 Business Tax Organizer 2023

Minert & Associates, PLLC is inviting you to complete the Business Tax Organizer 2023. Please click the button below to fill it out.

- 1 Engagement Letter
- 2 General Information
- 3 Financial Statement & Tax documents

[Show All](#)

[Get Started](#)

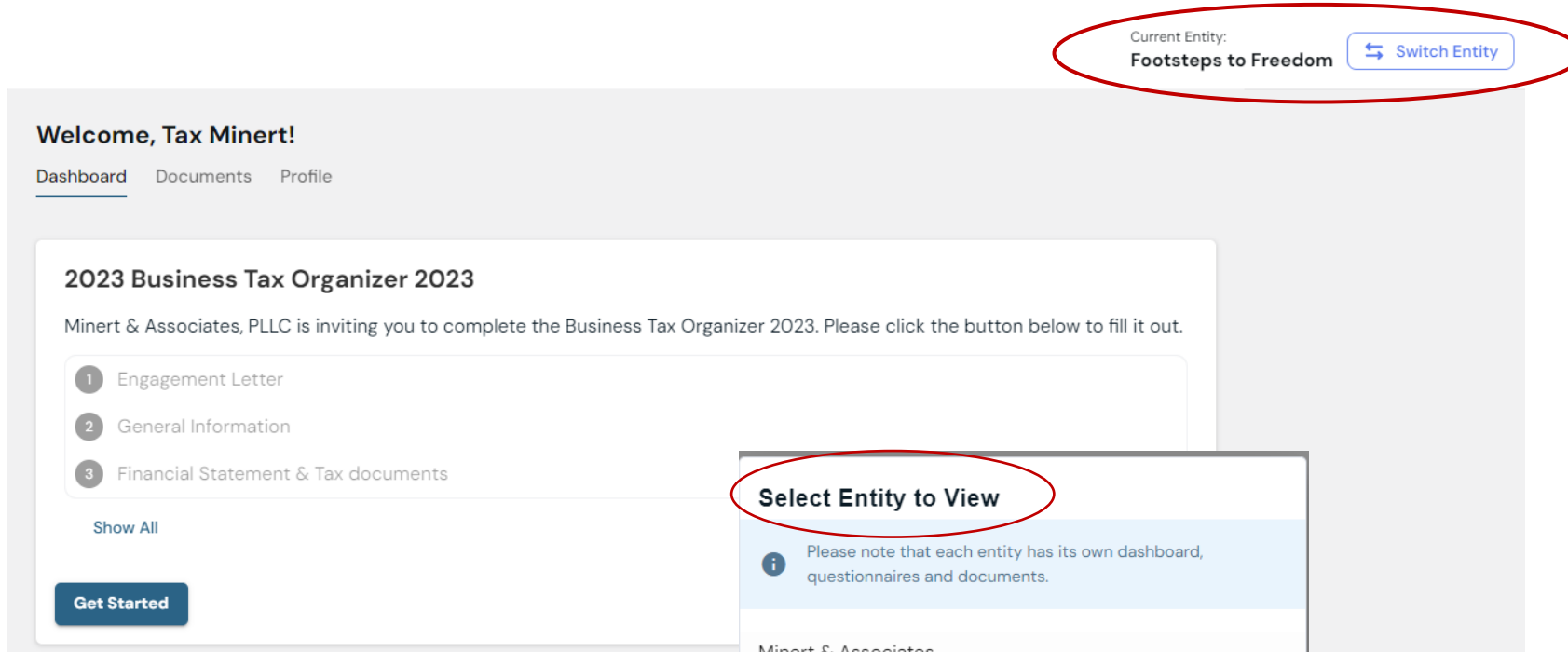
Click **Get Started** to start your Business Tax Organizer

Or Click **Documents** to Upload directly to the portal.

(instructions for uploading directly to portal at end of presentation)

STEP 3: To Switch Entities' from your portal.

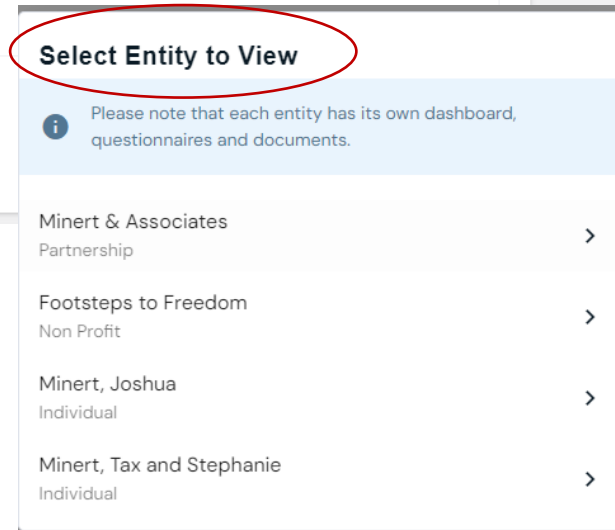
Click Switch Entity in top right corner.



The screenshot shows a user dashboard for 'Tax Minert!'. At the top right, the current entity is 'Footsteps to Freedom' and a 'Switch Entity' button is circled in red. The main content area is titled '2023 Business Tax Organizer 2023' and contains a list of steps: 1. Engagement Letter, 2. General Information, and 3. Financial Statement & Tax documents. A 'Get Started' button is at the bottom left.

Select new entity.

Taken to new entity's dashboard.



The screenshot shows a dropdown menu titled 'Select Entity to View', which is circled in red. It contains an information message: 'Please note that each entity has its own dashboard, questionnaires and documents.' Below the message is a list of entities with their types and a right-pointing arrow:

- Minert & Associates Partnership
- Footsteps to Freedom Non Profit
- Minert, Joshua Individual
- Minert, Tax and Stephanie Individual

STEP 3 Engagement Letter


- Review the Engagement Letter. Only one Signature needed.
- Type in your full name
- Click **Sign**

[Back to Dashboard](#)

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- Engagement Letter**
- General Information
- Financial Statement & Tax documents
- Additional Information
- ✓ Document Checklist
- Review & Submit

2023 Business Tax Organizer 2023

 Please e-sign the letter with your full name.

Dear Footsteps to Freedom:

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. To ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

We will prepare your 2023 federal and state personal income and/or business tax returns from information which you will furnish to us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. We will furnish you with questionnaires and worksheets to guide you in gathering the necessary information. Your use of such forms will assist in keeping the fee to a minimum.


It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, cancelled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.

Our work in connection with the preparation of your personal income/business tax returns does not include any procedures designed to discover defalcations and/or irregularities, should any exist. We will render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income/corporate tax returns.

×

Tax Minert

By clicking 'Sign', I agree that the signature above will be the electronic representation of my signature. **Opt out and print.**



[Next](#)

[Terms of Service](#) · [Privacy Policy](#) · [Help](#)

Tax Minert

Signed: Jan 18, 2024 — [Download Signed Document](#)

[Next](#)

STEP 4: Complete all Sections of the Tax Organizer

General Information through Additional Information

< Back to Dashboard

2023 Business Tax Organizer 2023

Please complete all questions.

1 Please select one of the following for 2023. * * Required

New Client to M&A

Business Started in 2023

None of the Above Apply

Add Note

2 Please select all that apply for 2023. *

Business Dissolved in 2023

Business Name Changed

- Go directly to any section. Skip any question and answer it later.
- Although, all *** Required** questions **must be completed**, and Engagement letter **e-signed** before the Tax Organizer will **Submit**.

***Drop off or mail tax documents but, complete Tax Organizer electronically?** When prompted to Upload a document, click **Provided Elsewhere**.

- Choose **Non-Applicable** if didn't receive a document...etc. and make a note in Additional Information Section.

Document Upload: within Tax Organizer

In the Business Tax Organizer there will be requests for you to Upload your tax documents.

You will be prompted by an Upload button.


A blue button with a white upward-pointing arrow and the text "Upload".

5 Did you refinance a principal residence, second home, or rental property? *


Yes
 No


Add Note

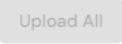

Upload **Closing/Settlement Statements** for refinance, here or at end of questionnaire.

 Upload


Upload Documents


 You can drag and drop files here. You can also access this page through your phone and take a picture of the document. Do not use slash (/) in the document name.



 Drag and drop files here or [browse](#)
(Max Size 150MB)



 

Upload Closing or Settlement Statements for refinance.

 You can drag and drop files here. You can also access this page through your phone and take a picture of the document. Do not use slash (/) in the document name.

 Drag and drop files here or [browse](#)
(Max Size 150MB)

 Steph's Driver's License .pdf 

Clicking on the **Upload** button opens a box for you to drag & drop files into.

When file appears click **Upload All**.

STEP 5: Document Checklist

Review all your documents to be uploaded when Tax Organizer is Submitted.

Several ways to upload your Tax Documents

- Within the questionnaire
- In the **Additional Information** Section
- In the **Document Checklist** Section

Introduction

Engagement Letter

✓ General Information

✓ Dependents

Purchases, Sales, Debt, & Income

Foreign Income

Retirement Information

Education Information

Health Care Information

Itemized Deductions

Miscellaneous Information

Additional Information

Document Checklist

Review & Submit

1 ^{* Required} Is there anything we should know that wasn't addressed in the previous questions or any additional information you need to provide? *

Yes

No

Add Note

2 Please upload any other document(s) you wish to provide regarding your tax filing that hasn't already been uploaded? ^{Optional}

Upload

Not Applicable Provided Elsewhere Add Note

3 ^{*} *Please type your name and date with the same legal effect as a handwritten signature, verifying that all of the above information is correct to the best of your knowledge. *

Taxpayer

Spouse

Not Applicable Answer Later Add Note

Next

Introduction

Engagement Letter

✓ General Information

✓ Dependents

Purchases, Sales, Debt, & Income

Foreign Income

Retirement Information

Education Information

Health Care Information

Itemized Deductions

Miscellaneous Information

Document Checklist

Additional Attachments

Next

Drag and drop files here or browse

Please upload any other document(s) you wish to provide regarding your tax filing that hasn't already been uploaded?

Additional Attachments

Next

*All documents uploaded within the questionnaire show up in Document checklist.

STEP 6: Review & Submit

When section is complete a **green check mark** is by the Section on the left-hand side. In **Review & Submit** section, it will also show when a section is complete.



< Back to Dashboard

2023 Recurring Client 2022 Tax Organizer US

Please check box below that says I Agree to submit.

General Information	Completed
Dependents	Incomplete
Purchases, Sales, Debt, & Income	Incomplete

When **all sections** are complete, check the **I Agree** box at the bottom of this page. Then click **Submit Answers**.

By submitting the questionnaire:

- I confirm that I have accurately answered all questions to the best of my knowledge and have uploaded most, if not all, requested documents that are available to me.

I Agree

Submit Answers

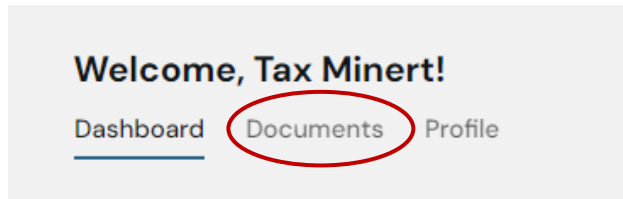
Upload directly to Portal- To upload a document after you've submitted or outside of your Tax Organizer...

Login to your Portal account at <https://app.soraban.com>.

Enter your email & password.

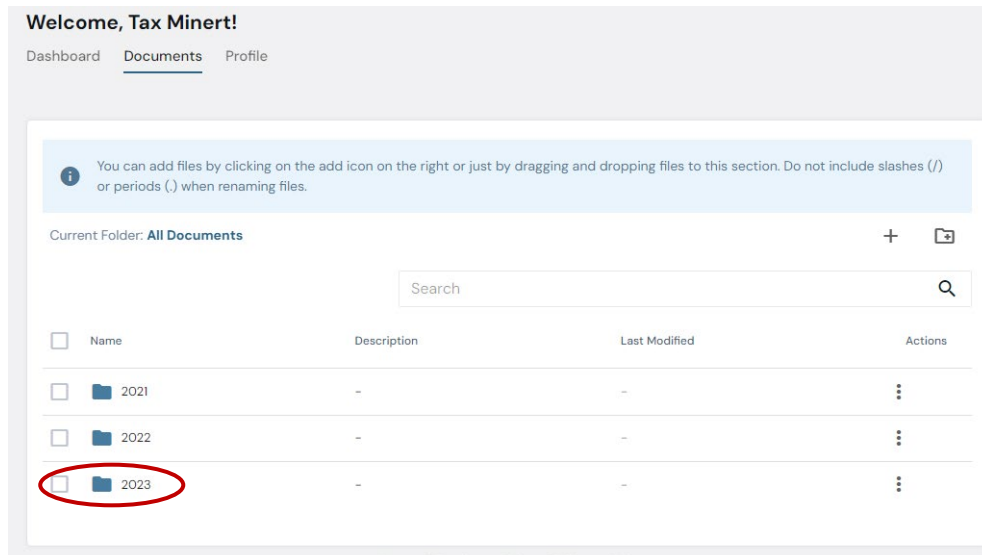
OR on our website www.RelieveFinancialStress.com.

Click on **Portal/Login New Portal Account**

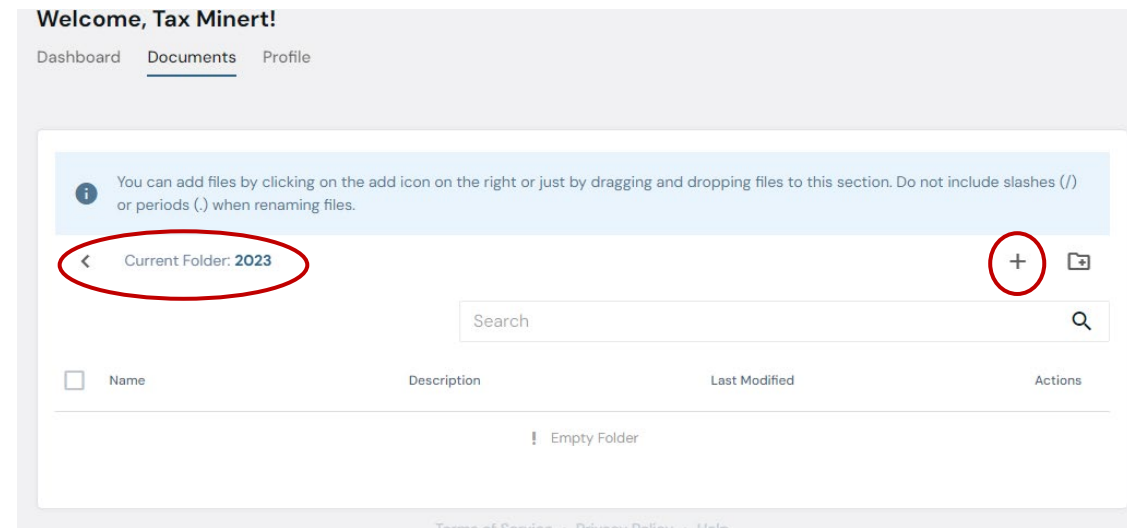


1- Login takes you to your Dashboard. Click on Documents.

2- In Documents, click on **2023** folder

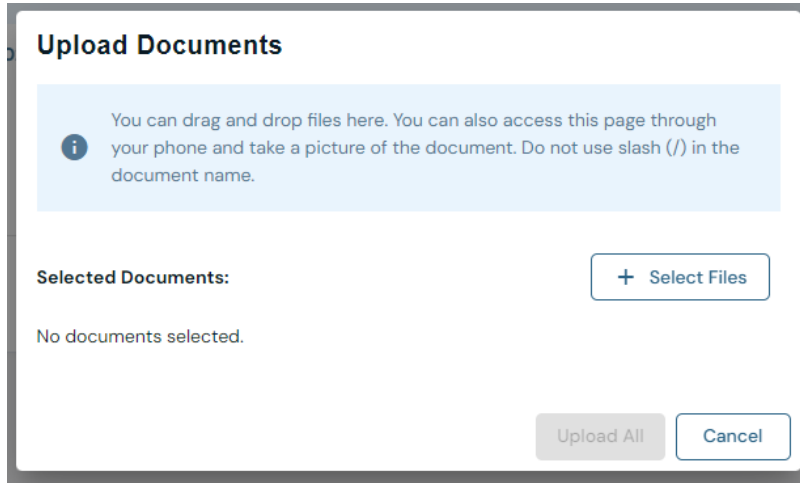


3- In **2023** folder. Click the **+** sign in the top right.

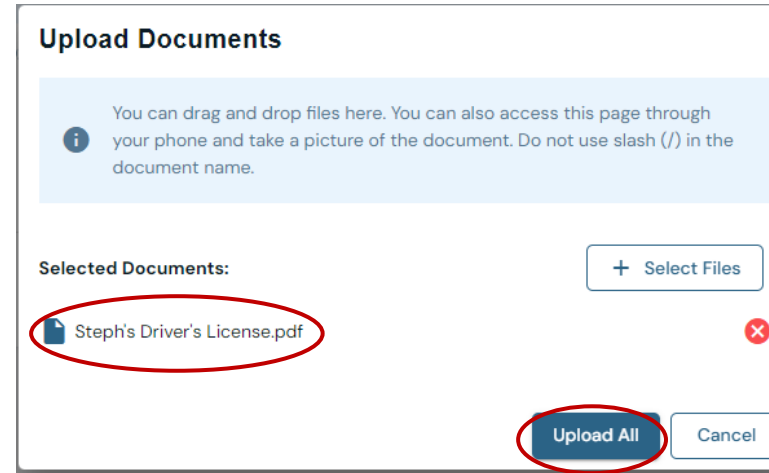


Upload directly to Portal - Continue

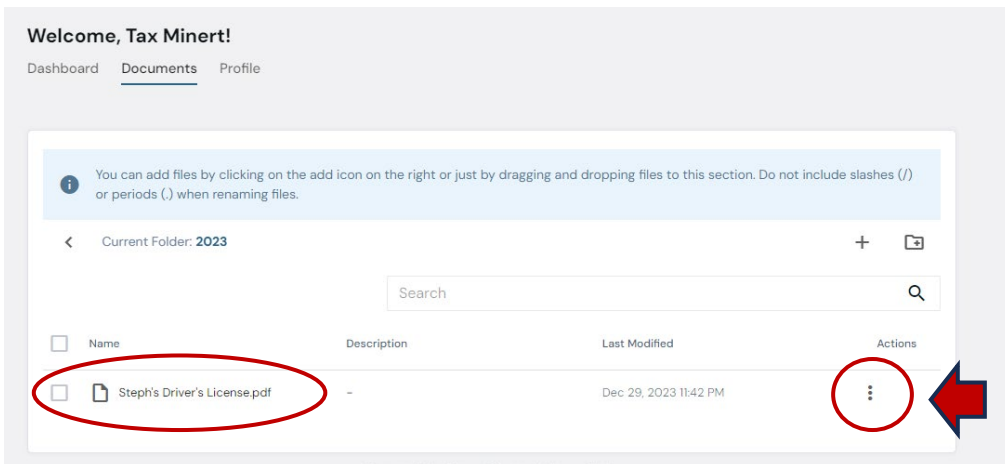
4- Upload Documents box pops up.
Drag & drop file or Select file.



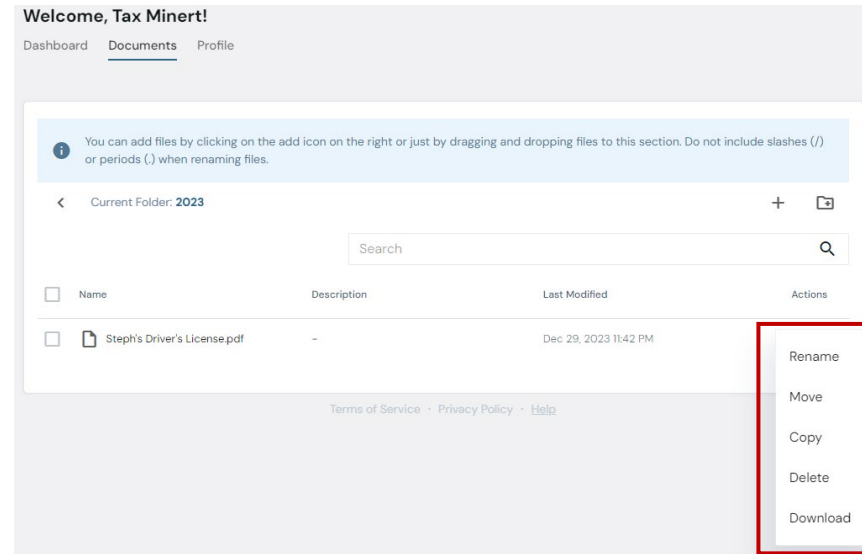
5- When file appears click **Upload all**.



6- File appears in your **2023** folder



7- Three Vertical dots at the end of File name under Actions.
Click 3 dots to **Rename, Move, Copy, Delete, or Download** the file.



***Please upload the business tax documents in the corresponding entity's 2023 folder or in the correct 2023 Business Tax Organizer.**

Current Entity: **Footsteps to Freedom** [Switch Entity](#) ?

Welcome, Tax Minert!

Dashboard Documents Profile

i You can add files by clicking on the add icon on the right or just by dragging and dropping files to this section. Do not include slashes (/) or periods (.) when renaming files.

Current Folder: **All Documents** + +

Search Q

<input type="checkbox"/>	Name	Description	Last Modified	Actions
<input type="checkbox"/>	2021	-	-	⋮
<input type="checkbox"/>	2022	-	-	⋮
<input type="checkbox"/>	2023	-	-	⋮

Select Entity to View

i Please note that each entity has its own dashboard, questionnaires and documents.

- Minert & Associates
Partnership >
- Footsteps to Freedom
Non Profit >
- Minert, Joshua
Individual >
- Minert, Tax and Stephanie
Individual >

Thank you for your patience as we transition to our new Portal with Soraban

- The portal will send us an email letting us know you submitted your Tax Organizer &/or uploaded document(s).
- Please give us **several days** to process & send a confirmation email that we received your Tax Organizer &/or documents.
- We can always be contacted at admin@minertcpas.com or 918-742-1616. You can also contact the portal Soraban at hello@soraban.com.



Minert & Associates, PLLC

CERTIFIED PUBLIC ACCOUNTANTS

Relieving Your Financial Stress.

www.RelieveFinancialStress.com