



Genesis Tax & Business Service LLC Client Portal Guide

This guide explains how to use the Genesis Secure Client Portal powered by Drake SecureFilePro.

Step 1 - Access the Portal

(<https://genesisbusinessservice.securefilepro.com/portal/#/login>)

Visit the Genesis Secure Client Portal using the link provided by Genesis Tax & Business Service LLC. If you do not have portal access, contact Genesis for an invitation.

Step 2 - Log In Enter your email address and password.

First-time users should follow the activation instructions received by email. If you forget your password, use the password reset option.

Step 3 - Upload Documents Select Upload Documents.

Choose files from your computer, phone, or tablet. Upload tax documents, bookkeeping records, payroll reports, and supporting documentation.

Step 4 - Download Documents

Access completed tax returns, financial reports, organizers, and other files shared by Genesis. Download and save copies for your records.



Step 5 - Secure Messaging Use the portal whenever possible to communicate securely regarding sensitive tax and financial information. Avoid sending Social Security numbers, tax returns, or financial information through unsecured email.

Step 6 - Best Practices

Upload documents as PDF when possible. Submit bookkeeping documents by the 15th of each month.

Respond promptly to information requests.

Maintain current email and phone information.

Keep your portal password secure.

Need Assistance?

Genesis Tax & Business Service LLC

Phone: 219-776-6706

Email: info@genesisbusinessservice.org

Website: www.genesisbusinessservice.org

Contact Genesis if you need assistance accessing or using the portal