

## Beason & Nalley Announces a Client Portal

### *So what is a Client Portal?*

Our newly implemented secure client portal is a gateway to a collection of electronic information and files that is accessible over the Internet via web browser.

### *Is our Client Portal secure?*

Beason & Nalley is committed to providing our clients secure and efficient online access to their financial information. Most electronic information is exchanged via email attachments, with the risk of accidental transmission of confidential information to the wrong person or having a message intercepted by an unauthorized third party during transmission. By using a secure web-based method of exchanging data files, you eliminate the chance of your secure documents falling into the wrong hands.

### *How do you use it?*

Information that can be placed on our client portal can range from simply posting static (PDF) copies of tax returns, Microsoft Word™ documents, financial statements, bank account balances and other information to more complex files, such as QuickBooks® files. The client portal is easy to use and the file exchange is *real time*, which means you will receive notification when your Accountant has posted information to the portal, and your Accountant will receive notification when you post information.

If you are interested in utilizing our client portal, contact Sandra Baker via email at [sbaker@beasonnalley.com](mailto:sbaker@beasonnalley.com) or telephone 256-533-1720.