

Frequently Asked Questions

What is a Client Portal?

This is an online secure document storage and sharing service provided by SmartVault. Please read the enclosed letter introducing the Secure Client Portal.

Where is the Client Portal?

<https://my.smartvault.com> (bookmark this website for future use)

Link to the Client Portal on our website cpask.com

How do I login to the Client Portal?

You will receive an email invitation with a link to create a password.

I forgot my password, can Sweeney Kovar tell me what my password is?

No, Sweeney Kovar does not have access to your password. You must reset your password by clicking on the link "Having Trouble Signing In" on the Sign in page

Where are my documents stored in the Client Portal?

You will have your own Vault in the Sweeney Kovar Client Portal. Only you have access to this Vault.

Can I complete my organizer online through the Client Portal?

No, you will need to print the Organizer and complete it. You can request an Electronic Organizer by emailing jan@cpask.com

Can I email a copy of my tax return from the Client Portal?

No, you must save a copy of the tax return to your own computer and then send that copy as an attachment to your email.

I am refinancing my home, can my mortgage lender get copies of my tax return from the Client Portal?

No, only you have access to your documents in the Client Portal. For security reasons, do not share your login password with any third party.

Can I send documents to Sweeney Kovar through the Client Portal?

Yes, scan your documents then upload them to the Client Portal "Client Source Documents" folder.

How do I get help with the Client Portal?

Click on the Help button in the Client Portal, or

Visit our website cpask.com where you will find:

1. a link to a Video Tour of the Client Portal
2. a link to reset your password