

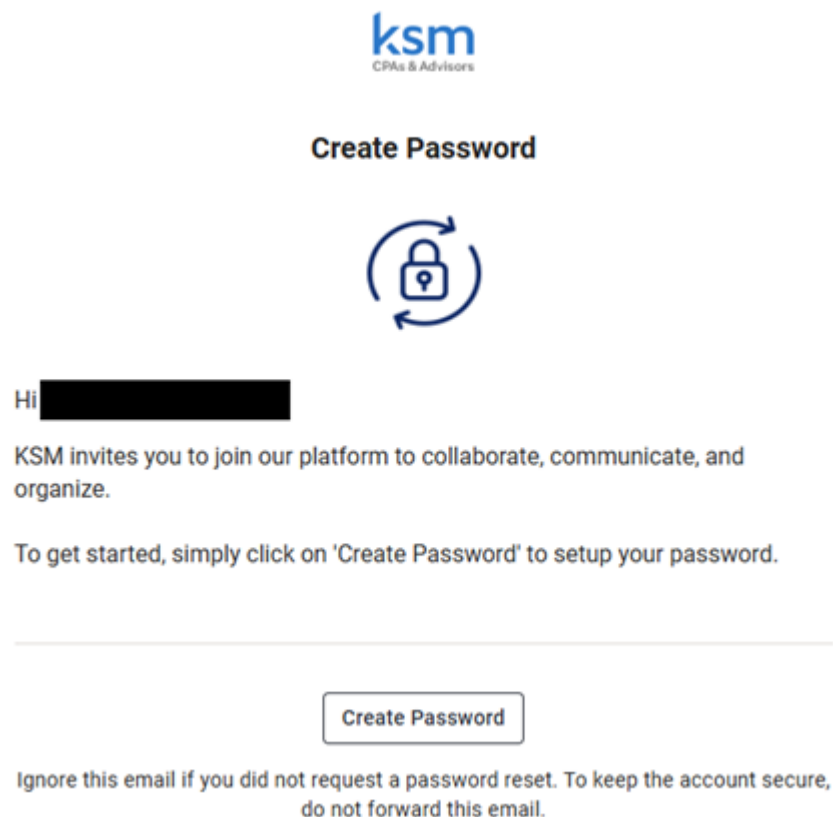
# HubSync Platform Registration

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## Invitation email

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Example of the invitation email to create a password for the portal.


Please follow on-screen prompts to create your secure account.

## Invitation email – create password

### Update your password

*Password must meet the following constraints:*

- *Must be between 8 and 256 characters in length*
- *Must contain both upper and lower case characters*
- *Must contain at least one non-alphanumeric character*
- *Must contain at least one number*

 Password

 Confirm password

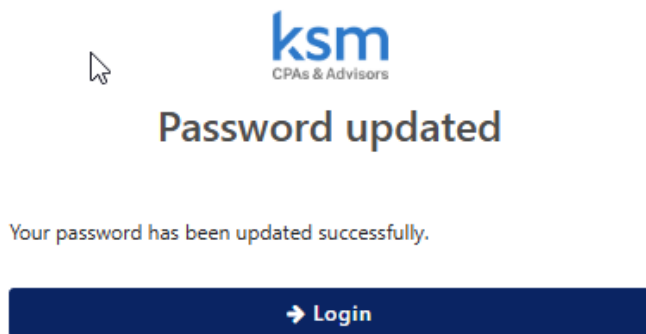
→ Submit

Your platform username is your email address at which you received the invitation.

To finish creating your account, enter a password that meets all the requirements listed.

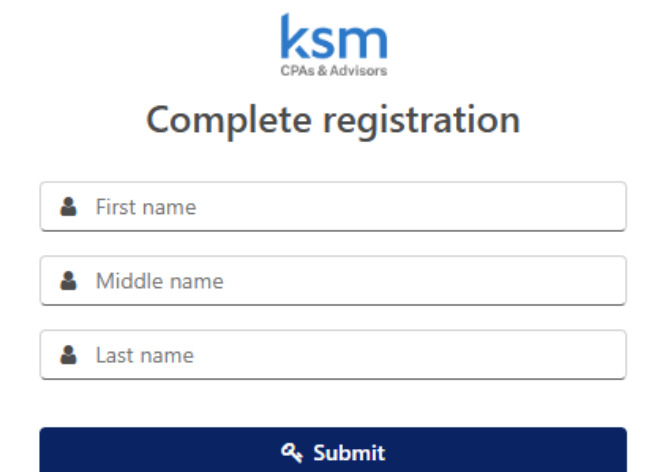
Click “Submit.”

## Complete registration



The screenshot shows a confirmation screen for a password update. At the top is the ksm logo with 'CPAs & Advisors' underneath. Below the logo, the text 'Password updated' is displayed in a large, bold font. Underneath that, a smaller line of text says 'Your password has been updated successfully.' At the bottom of the screen is a dark blue button with a white right-pointing arrow and the word 'Login' in white text.

Confirmation of password updated will be displayed on the next screen with request to Login.



The screenshot shows a registration form. At the top is the ksm logo with 'CPAs & Advisors' underneath. Below the logo, the text 'Complete registration' is displayed in a large, bold font. Underneath that are three input fields, each with a person icon on the left and a label: 'First name', 'Middle name', and 'Last name'. At the bottom of the form is a dark blue button with a white magnifying glass icon and the word 'Submit' in white text.

Next screen will ask for your First, Middle, and Last Names.

# Enable two-factor authentication

The screenshot shows a web interface for enabling two-factor authentication. At the top, a blue banner contains the KSM logo and the text 'CPAs & Advisors'. Below this, a message states 'You must configure two-factor in order to continue.' with an information icon and a close button. The main heading is 'Enable two-factor'. A dropdown menu labeled 'Select a method \*' is set to 'Email'. Below this, instructions state: 'To enable two-factor using email, click the button to send a one-time use code. Once you receive the code, enter it in the form below.' The email address 'Email: toozdeigh@gmail.com' is displayed. A button labeled 'Send a one-time code' with a circular arrow icon is present. Below that, a 'Verification code \*' section has a text input field with the placeholder 'Enter the one-time code'. At the bottom is a large blue button labeled 'Enable' with a shield icon.

For your security, two-factor authentication must be established.

Select a method from the drop-down menu – Email or SMS.

Click on "Send a one-time code" and when verification code is received, enter in the field provided and click "Enable."

# Two-factor authentication recovery codes



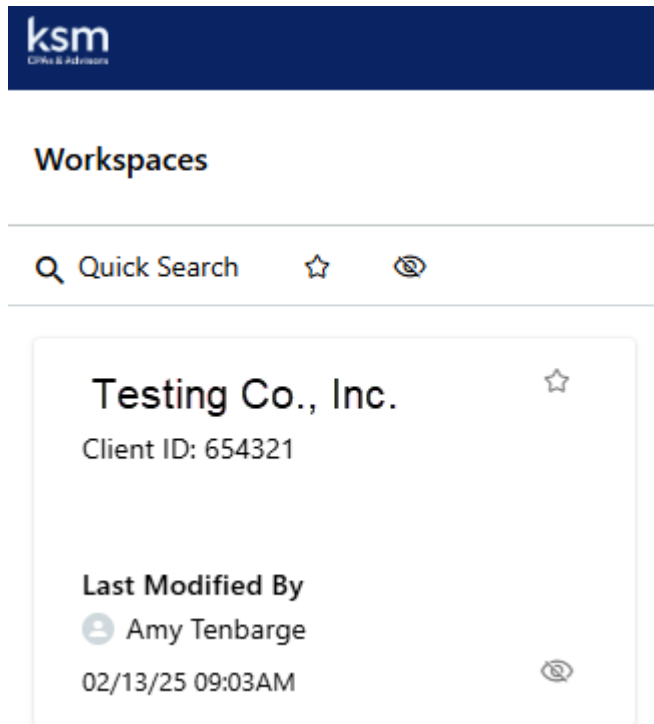
System will produce 10 recovery codes for your safekeeping in the event you lose your device.

Please store these in a safe location.

Click “Done” to complete your registration and access your client portal.

Note that you will be prompted to accept KSM’s Acceptable Use Terms and Policy.

## Example of portal

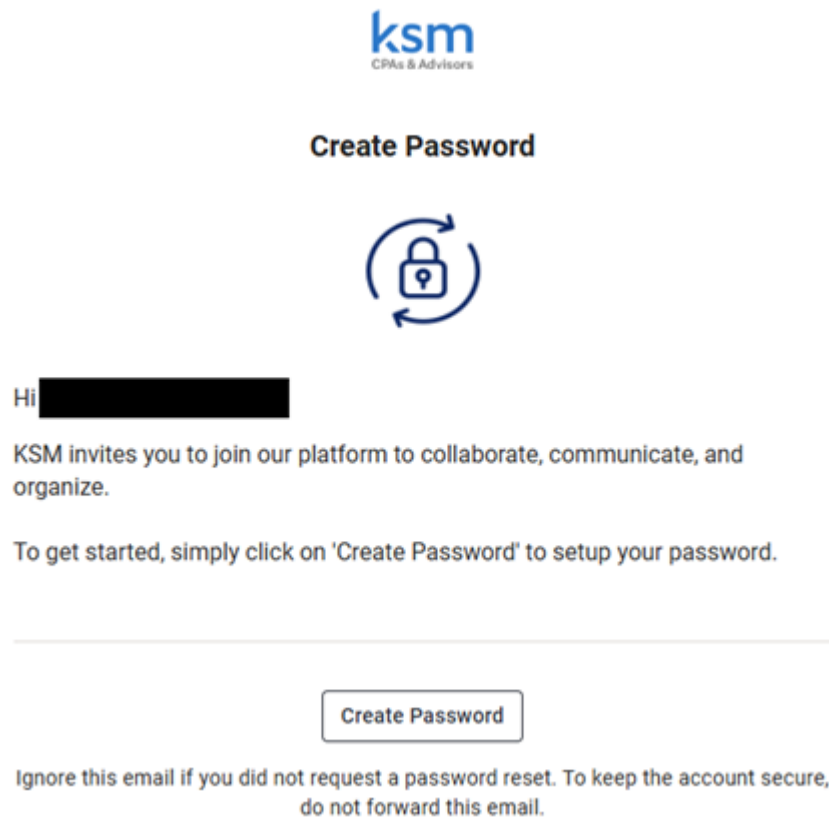


Your workspace will be displayed as the one shown on this page.

Please note that if your email address is associated with multiple client relationships with KSM, and you are invited to all of those with the same email address, you will see all of your workspaces in one place.

Examples: taxpayer with children or associated entities group.

# HubSync workspace invitation



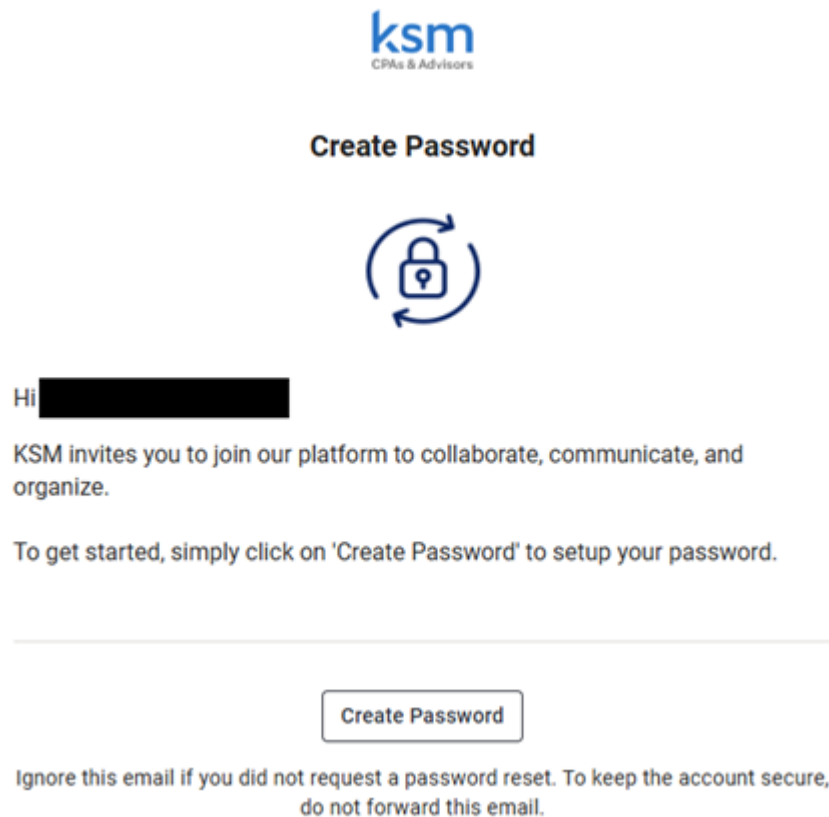
Example of workspace invitation email is displayed on this page.

Please follow on-screen prompts to create your secure account.

Existing registered users will need to log in to view all HubSync workspaces they've been invited to.



## HubSync – resent invitation



If the original invitation email was misplaced, the invitation will be resent.

Example of this resent invitation email notification is presented here.

Please follow on-screen prompts to create your password to access your HubSync workspace(s).

Registered users will be able to view all HubSync workspaces they've been invited to with the same email address.