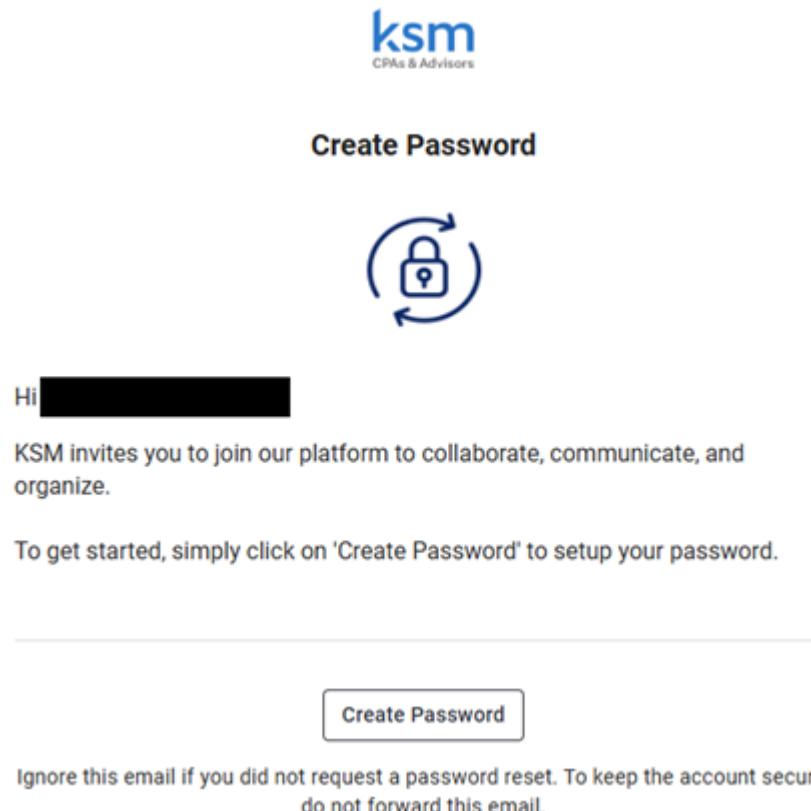


HubSync Platform Registration



Invitation email



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



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

A screenshot of a web page titled 'Complete registration'. The page includes the 'ksm CPAs & Advisors' logo. Below the title are three input fields: 'First name', 'Middle name', and 'Last name', each preceded by a small user icon. At the bottom of the form is a dark blue 'Submit' button with a magnifying glass icon.

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

Enable two-factor authentication

You must configure two-factor in order to continue.

ksm
CPAs & Advisors

Enable two-factor

Select a method *

Email

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.

Email: toozdeigh@gmail.com

Send a one-time code

Verification code *

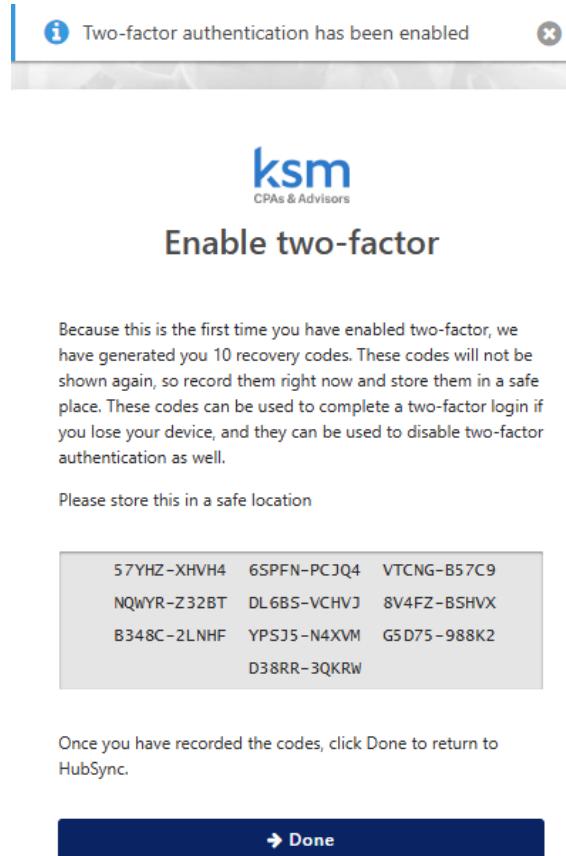
Enter the one-time code

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



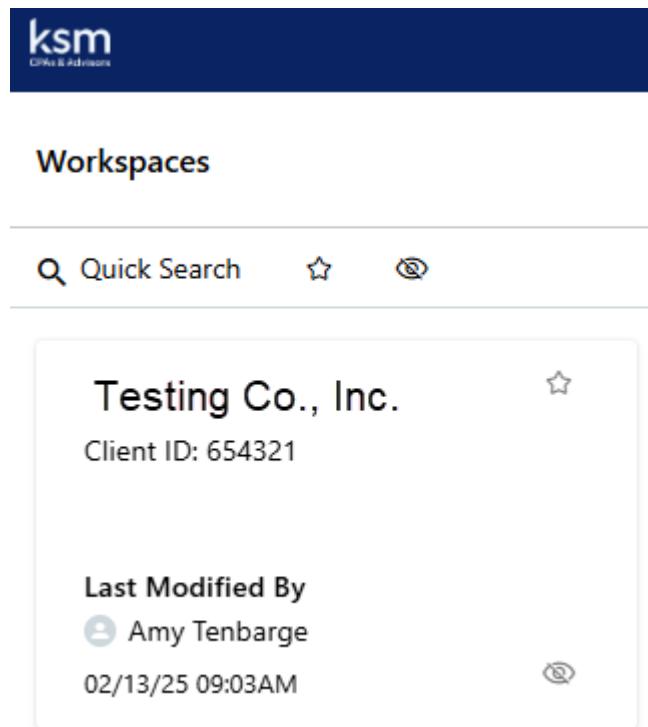
System will produce 10 recovery codes for your safekeeping in the event you lose your device.

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



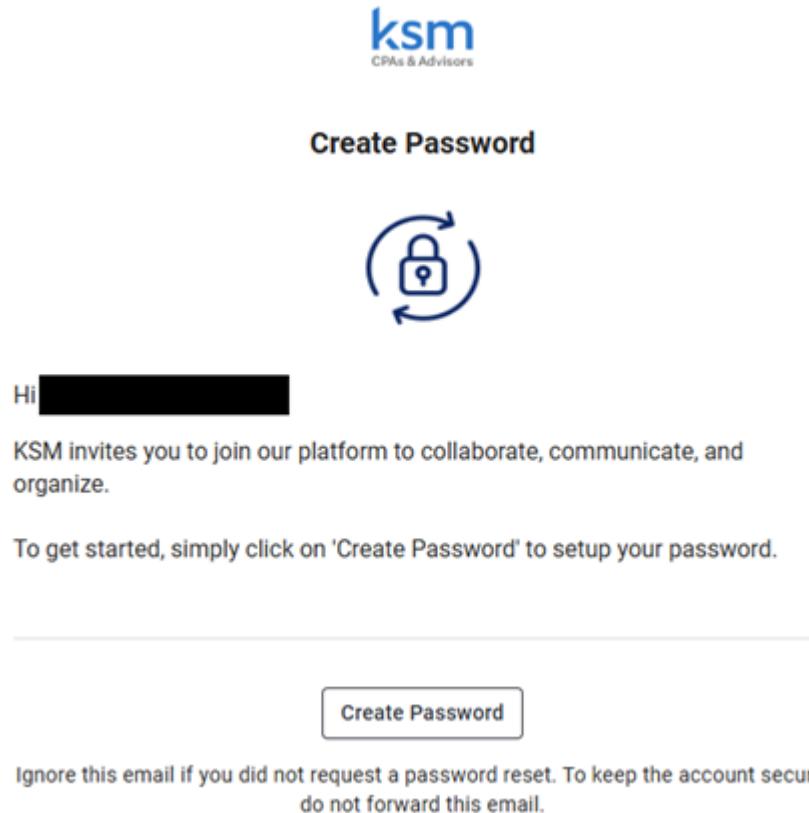
The screenshot shows the KSM portal's 'Workspaces' page. At the top, there's a dark blue header with the 'ksm' logo. Below the header, the page title 'Workspaces' is displayed. A search bar with the placeholder 'Quick Search' and icons for filtering and sorting is present. A single workspace entry is shown in a card format: 'Testing Co., Inc.' (Client ID: 654321), with a star icon to the right. Below this, a 'Last Modified By' section shows 'Amy Tenbarge' (02/13/25 09:03AM) with a refresh icon.

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

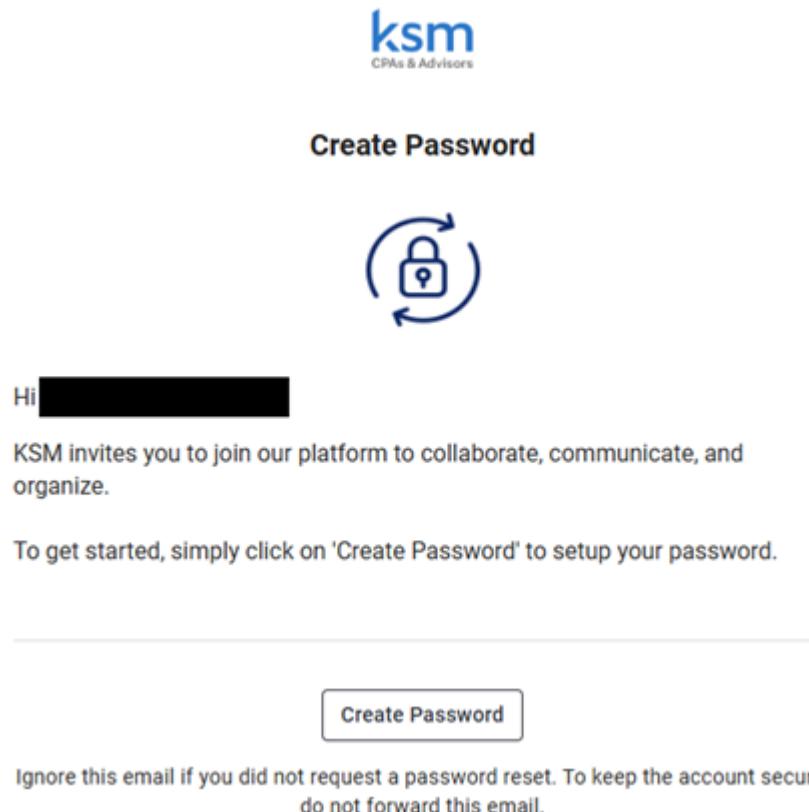


Example of workspace invitation email is displayed on this page.

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.