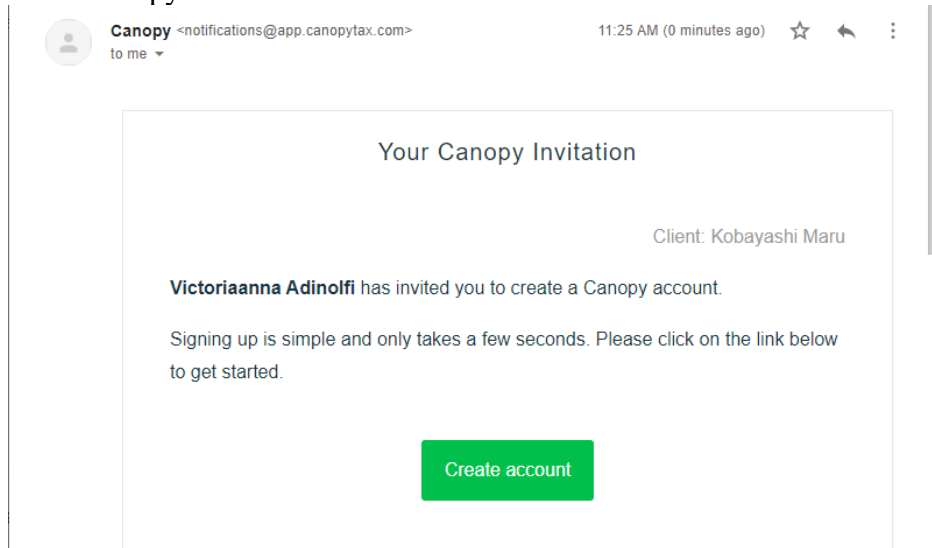


Your Canopy invite looks like this:

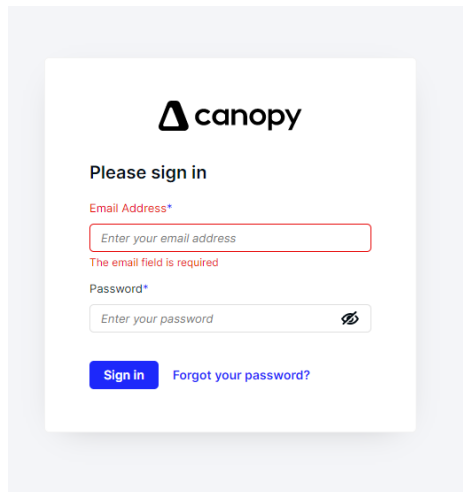


You create your account using the email the invite was sent to and by creating a password.

Logging into Canopy:

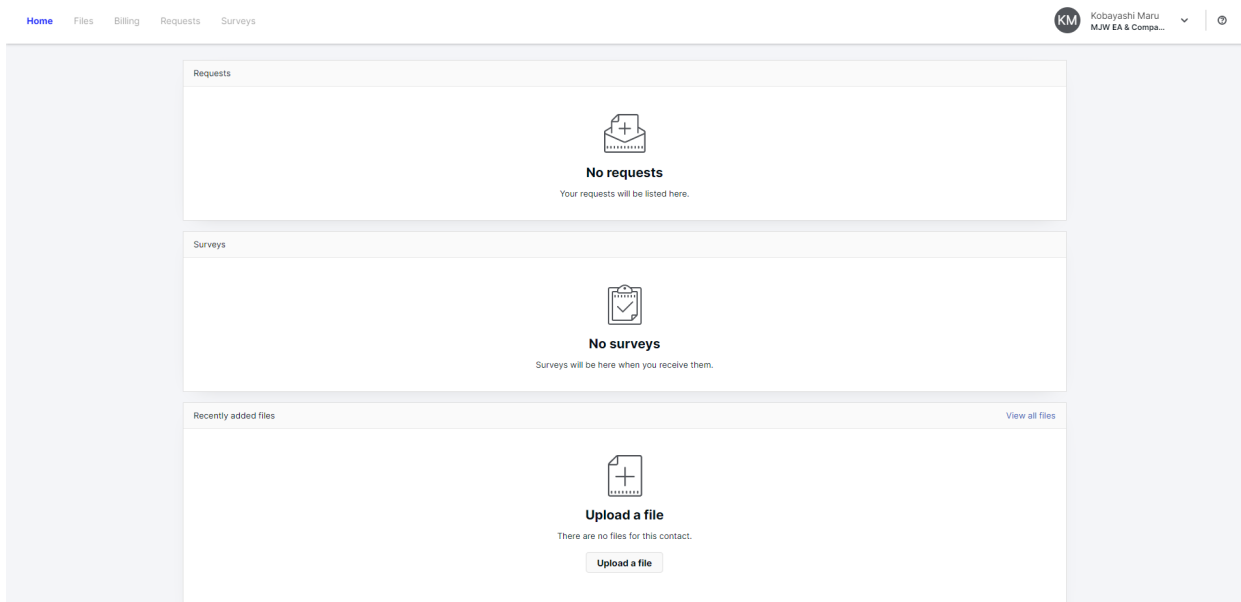
Be sure to use Google Chrome. Navigate to:

https://app.canopytax.com/#/login?redirect_url=https%3A%2F%2Fapp.canopytax.com



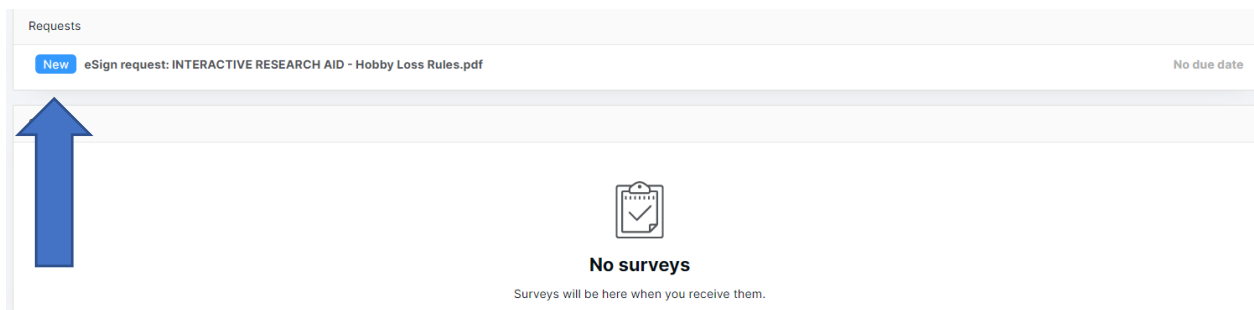
Enter the email and password you have created. We do not create or manage passwords, so if you can't get in choose "Forgot your password?" to change it.

Once in, you will see your portal.

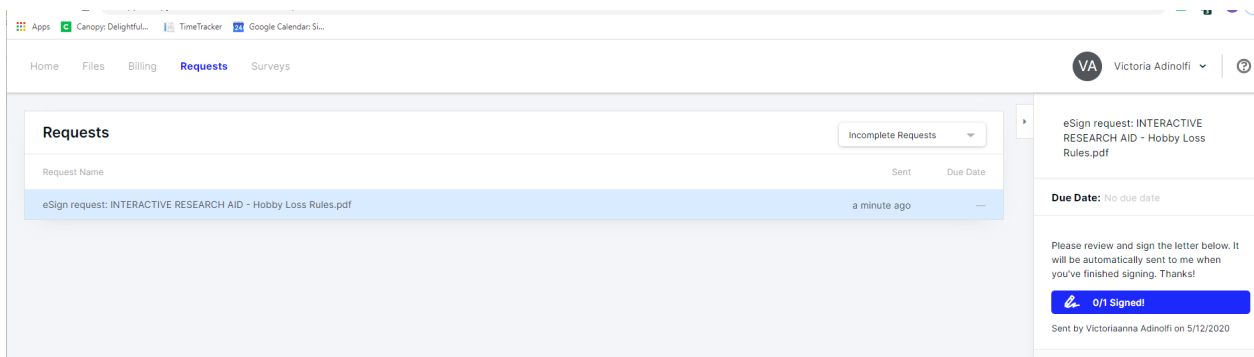


Here is where you can upload files and where you will see files we have uploaded for you. You can right click on the files or click “View all files” on the right hand side to download them.

When we upload your tax return, we can send a request for you to e-sign. If we do, you would click on the blue request to see what we’re asking for:



Once you do, you can access the form that we asked you to sign.



Once you sign, we get notification that you have done so and there is nothing more to be done on your part.