



# WELCOME TO YOUR PORTAL

the **safe & secure** way to share and access your documents


## INTRO

At Growth Partners, we make managing your finances a breeze with our client portal, putting all your financial information right at your fingertips. Access your accounts or upload documents for the team, all in one convenient, safe and secure place.

## VIEWING DOCUMENTS


When you log into your portal your recent documents will appear on the home screen, for quick, secure and easy access, you can also navigate directly to your folders from the navigation bar.

- 1 your recent documents from home screen
- 2 access all your documents from the navigation bar



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[First time here? Find out more →](#)

**Lodgement Dates** [See all](#)

+ Add event

JAN 20	How you can be more sustainable this year Tue, Jan 20, All day
JAN 21	IAS Wed, Jan 21, All day
JAN 28	Q2 SGC Payment Wed, Jan 28, All day
JAN 31	Large & Medium Entity 2025 Tax Return Sat, Jan 31, All day

**Your Documents** [1](#) [See all](#)

Name	Modified	Modified By
Annual Checklist - Individual Tax Return (FYI-782138665).xlsx	October 16, 2024	Growth Partners



# THE SAFE & SECURE WAY TO SHARE AND ACCESS YOUR DOCUMENTS

## UPLOADING DOCUMENTS

You can easily and securely share any documents with us using your **Upload Folder**. Simply drag and drop into the **Upload folder**, within 15 minutes this will sync securely with our system and notify us that you've shared documents with us.

**Growth Partners | Client Portal**

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Edit in grid view Share Copy link Download Export to Excel Automate Integrate Sync ...

**2** Documents > Mary Watson-34502119

Name	Modified	Modified By
2023	February 28, 2024	Growth Partners
2024	June 18, 2024	Growth Partners
Upload <b>1</b>	June 28, 2023	Growth Partners
Bank Statement (FYI-460143588).pdf	October 9, 2023	Growth Partners
Bank Statement (FYI-460143588)1.pdf	March 28, 2024	Growth Partners
FYI_ Collaborate - Welcome to your Por...	May 16, 2024	Growth Partners

**1** your Upload Folder to share documents with us securely

**2** your document folders for you to securely access any previously shared documents

## ACCESSING DOCUMENTS

Your documents are always available for you so you can log in at anytime to securely access what you need when you need to.

**TIP:** You can quickly and securely access the portal from our homepage, we also recommend bookmarking the link for easy future access.



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