

## Instructions for Logging into the INTAC Client Portal

Go to INTAC's Website: [www.intacinc.com](http://www.intacinc.com)

- Enter the site by clicking on the INTAC logo on the left hand side of the page
- Click on **CLIENT LOGIN** (top right of the page or on the left hand options)
- To login to the Client Portal: Enter Email, EIN # & Password\* , then click Submit



The screenshot shows a login form with the following fields and elements:

- Email:** A text input field containing "john@abc.com".
- Password:** A password input field with masked characters "\*\*\*\*\*".
- EIN # (ex. 12-3456789):** A field with two sub-inputs: the first contains "12" and the second contains "3456789".
- SUBMIT:** A button to the right of the EIN # field.
- Forgot Password? Click Here:** A link below the EIN # field.

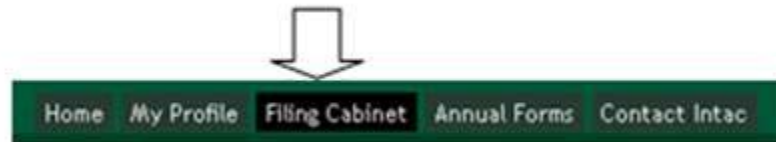
\*If this is your first time logging in, your password would be the phone number we have on file for you. You will then be prompted to change your password.

**You may be asked to complete the following (only if you have not done so previously):**

- Change your password, select and answer security questions
- Review and electronically sign the Client Services Agreement and Fee Schedule (you will need to scroll to the bottom of each form for signature area). *If you choose to sign the forms at a later date, they will appear each time you login until they are signed.* These agreements can also be accessed from the Client Portal Home page.

## Instructions for Viewing Documents on Client Portal

- On the Client Portal Home Page, click on the **FILING CABINET** tab located at the top of the screen



- On the Filing Cabinet page, click on the name of the document you would like to view
- If your document has an expiration date, it will no longer be available after that date
- If you do not see the document or would like viewing access for additional documents, contact your pension consultant for assistance