

GRAHAM PAUL CLIENT PORTAL USER AGREEMENT

Client Name
Client reference

To ensure that we continue to offer our clients the very best in client service we are introducing a new means of client communication which will replace post and email.

All future exchanges of documentation that you will have with Graham Paul will take place through a secure on line portal that can only be accessed by you and your existing advisor at the firm. The portal we have set up for you is located at www.irisopenspace.co.uk. It will allow us to send all sorts of documents to you in a secure manner. You will be able to download them to your computer, save as a pdf, or print them. Your portal will also allow you to digitally sign documents which we can then pick up from the portal and send to third parties like HMRC if required to do so.

Your portal will be unique to you. Each client will have their own portal. For example a Limited company with two owner directors for whom we prepare tax returns will have three, a three person partnership will have four one each for each tax payer and one for the partnership and a husband and wife who have their tax returns prepared by the firm will have two.

Graham Paul has chosen to use this system as it has been proven to be far more secure than email and is quicker and more reliable than the postal services.

When you return the signed copy of this sheet to us we will send you an email which will contain the link to follow for registering your username and password. Instructions on how to use the portal may be found at www.grahampaul.com/client_area.

By signing this user agreement you accept the terms of the user agreement under Appendix A which may be found at www.grahampaul.com/client_area. You also accept that from the date of the agreement you will deliver any documentation you need to send to us using the portal and that we will send documentation for your information and action to you through your portal. As documents are added to your portal you will receive a notification to the email address that you will give us that will be used for all communications with the firm. This email address is called the Primary Email and is requested below.

I agree to use the Graham Paul portal under the terms of the user agreement

Signed.....

Date.....

Full name.....

Preferred primary email address.....