

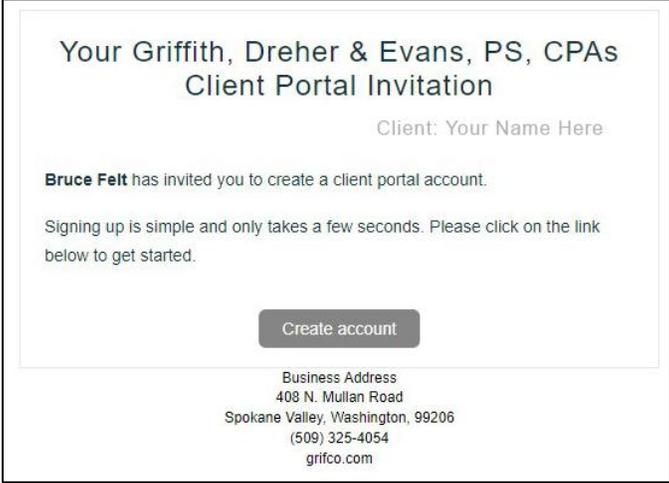
## Canopy

### Client Portal Login Instructions

Canopy is our Client Portal Technology Partner.

To log in to the Client Portal for the first time, you will need to click the link provided in the email invite from your practitioner.

1. **Click *Create Account*.**



Your Griffith, Dreher & Evans, PS, CPAs  
Client Portal Invitation

Client: Your Name Here

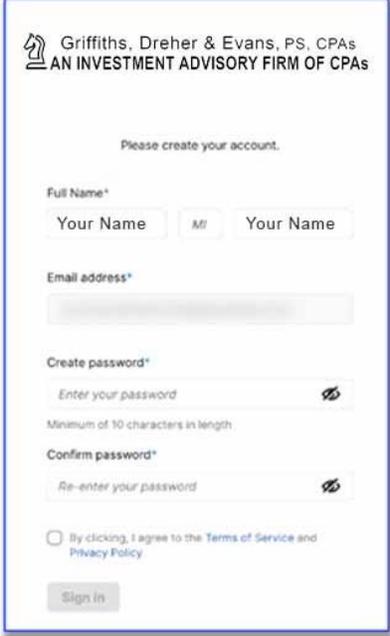
**Bruce Felt** has invited you to create a client portal account.

Signing up is simple and only takes a few seconds. Please click on the link below to get started.

[Create account](#)

Business Address  
408 N. Mullan Road  
Spokane Valley, Washington, 99206  
(509) 325-4054  
grifco.com

2. **Enter your account information (First and Last Name)** Your email address pre-fills automatically.



 Griffiths, Dreher & Evans, PS, CPAs  
AN INVESTMENT ADVISORY FIRM OF CPAs

Please create your account.

Full Name\*

Your Name  MI  Your Name

Email address\*

Create password\*

Enter your password  

Minimum of 10 characters in length

Confirm password\*

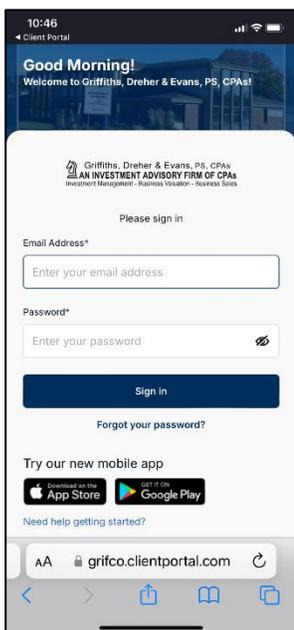
Re-enter your password  

By clicking, I agree to the [Terms of Service](#) and [Privacy Policy](#)

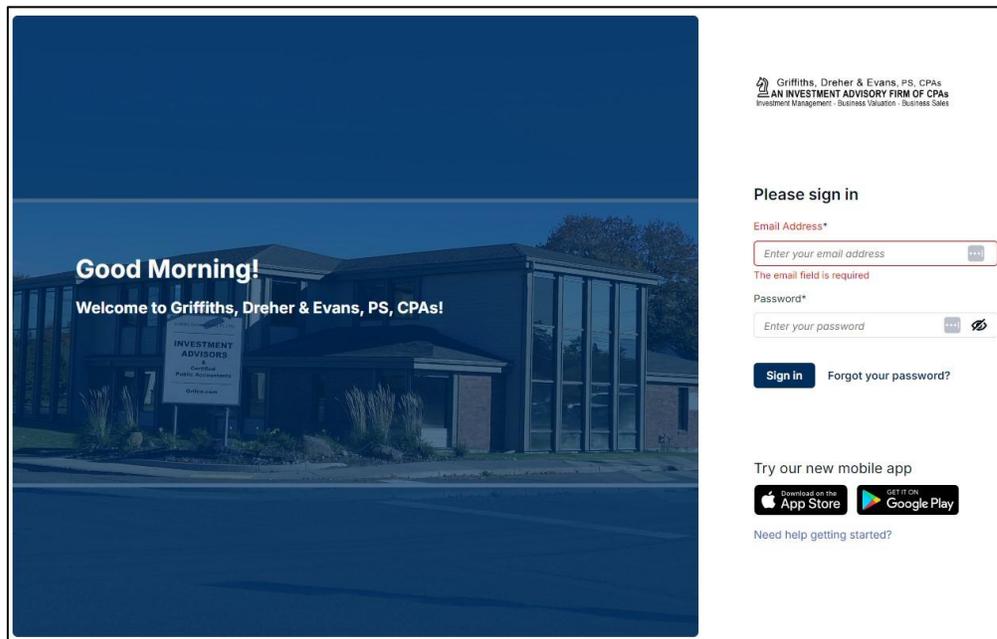
[Sign in](#)

3. **Type your preferred password in the Create Password field.**  
Re-enter your password in the **Confirm password** field.
4. **Agree to the Terms of Service and Privacy Policy.**
5. **Click *Sign In*.** The Client Portal populates in a new tab on your browser

6. **Enter your Email and Password.**
7. **Click *Sign in* and you're into your Client Portal!**



Phone

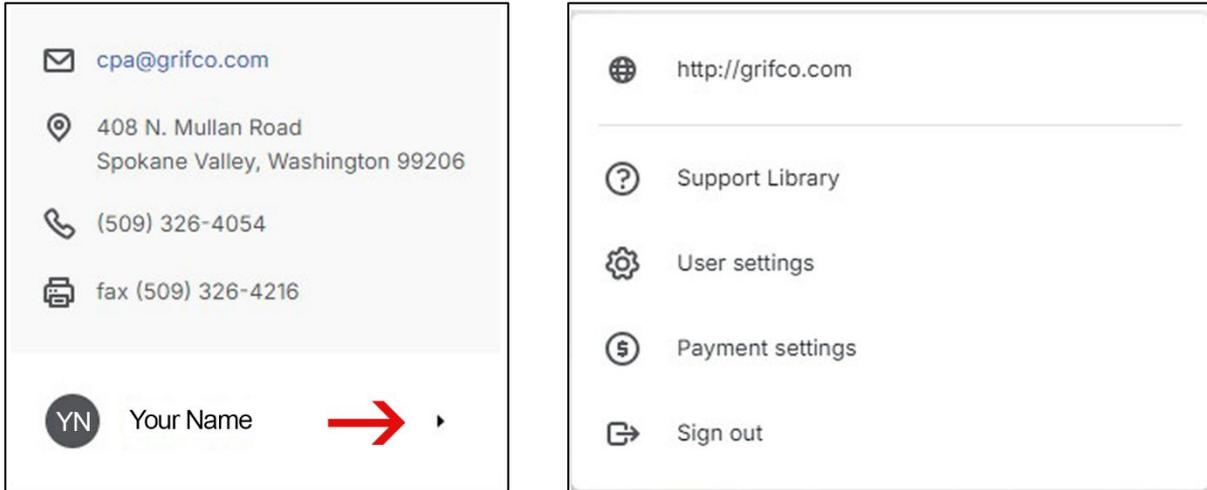


Laptop

## Two-Factor Authentication

Client portals need two-factor authentication to protect information between you and your CPA. For more security, you can send a six-digit code to your account **email** or **phone** to authenticate.

### 8. On your Home Page, click the small arrow next to your name and a window will open



The screenshot shows a user profile dropdown menu. On the left, there is a grey box containing contact information: an email icon next to 'cpa@grifco.com', a location pin icon next to '408 N. Mullan Road, Spokane Valley, Washington 99206', a phone icon next to '(509) 326-4054', and a fax icon next to 'fax (509) 326-4216'. Below this is a circular profile picture with 'YN' and the text 'Your Name' followed by a red arrow pointing to a small black triangle. On the right, a white dropdown menu is open, listing: a globe icon next to 'http://grifco.com', a question mark icon next to 'Support Library', a gear icon next to 'User settings', a dollar sign icon next to 'Payment settings', and a sign-out icon next to 'Sign out'.

### 9. Click Settings



This screenshot is identical to the previous one, but with a red arrow pointing to the 'User settings' option in the dropdown menu.

**10. Your User Settings Page will appear. Go down to Two-Factor Authentication to follow the directions to create your settings.**

**User Settings**

First name\*  
Anew

Last name\*  
Client

Email\*  
anewclient@gmail.com

Updating this email will only change your login credentials. To change the email your accountant uses to contact you, please contact your practitioner.

Phone  
(509) 555-2222

Time zone  
America/Los\_Angeles (Pacific Time)

[Reset password](#)

**Two-Factor Authentication**

Two-Factor authentication is required every 30 days during sign-in. You'll be required to complete an additional verification step (in addition to sending a 6-digit passcode to verify your device login).

Email  ✓ Email Verified

Text Message (SMS)  ✓ SMS Verified

You agree to receive text messages. Message and data rates may apply.

[Remove Number](#)

Authenticator app ⓘ [Setup authenticator](#)

**Two-Factor Authentication**

Two-Factor authentication is required every 30 days during sign-in. You'll be required to complete an additional verification step (in addition to sending a 6-digit passcode to verify your device login).

Email  ✓ Email Verified

Text Message (SMS)  ✓ SMS Verified

You agree to receive text messages. Message and data rates may apply.

[Remove Number](#)

Authenticator app ⓘ [Setup authenticator](#)

**11. Choose a method to receive the code.**

**Griffiths, Dreher & Evans, PS, CPAs**  
AN INVESTMENT ADVISORY FIRM OF CPAs

**Two-Factor Authentication**

A one-time passcode will be sent to you as an additional verification step.

How do you want to get the code?

Email: a\*\*\*\*\*t@gmail.com

Text Message: \*\*\*\*\*9961

[Next](#) [Back](#)

Having troubles? Contact your practitioner.



**Griffiths, Dreher & Evans, PS, CPAs**  
AN INVESTMENT ADVISORY FIRM OF CPAs  
Investment Management · Business Valuation · Business Sales

**Two-Factor Authentication**

A one-time passcode will be sent to you as an additional verification step.

How do you want to get the code?

Email: b\*\*\*\*\*t@comcast.net

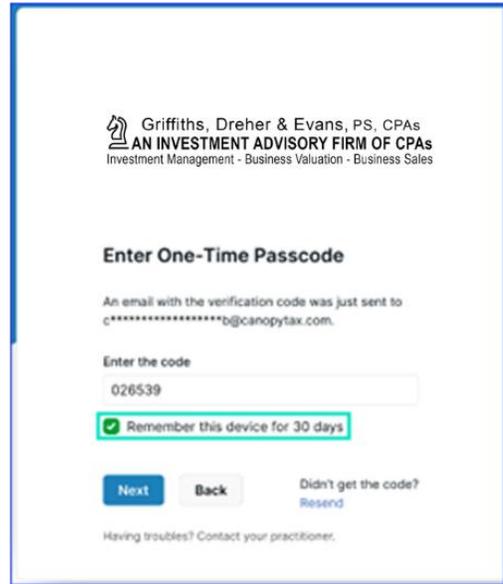
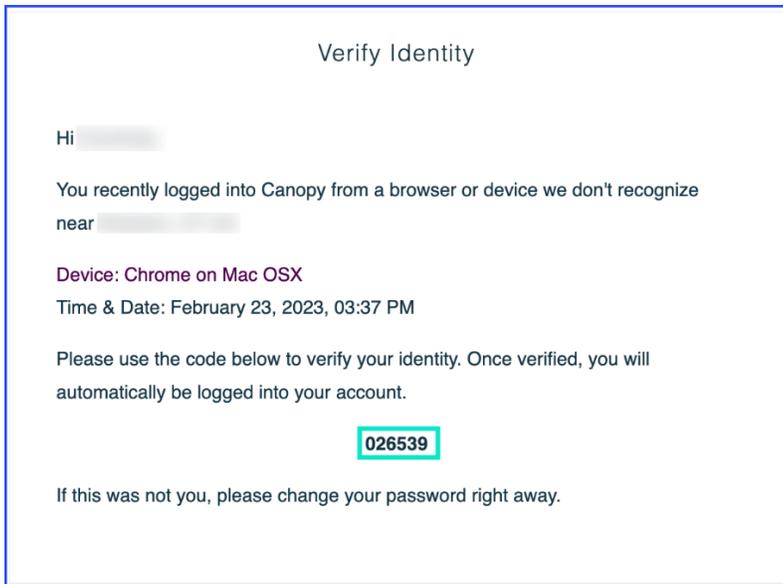
Text Message: \*\*\*\*\*9961

By continuing, you agree to receive text messages. Message and data rates may apply.

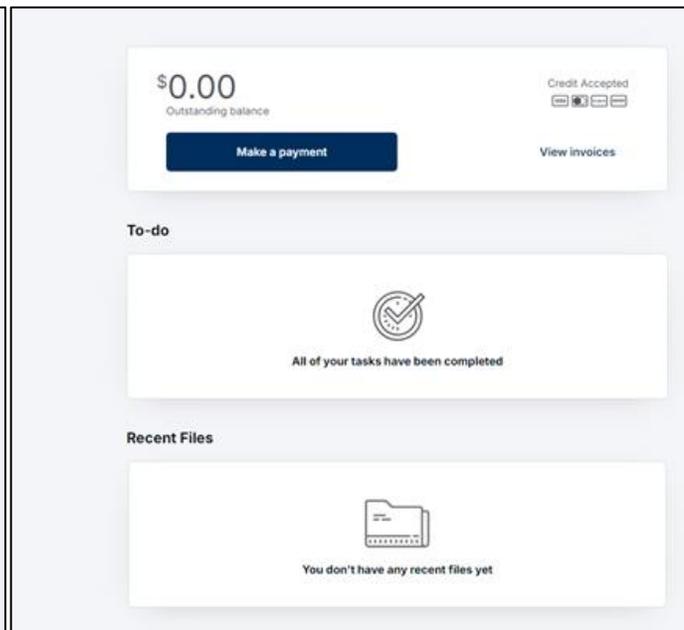
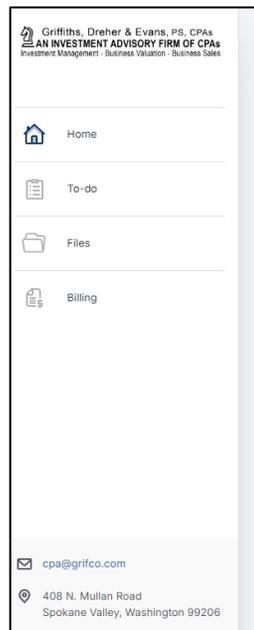
[Next](#) [Back](#)

Having troubles? Contact your practitioner.

12. Enter the code you received via email or phone into the digit field.



13. Click **Next** to re-enter your Portal Account



**Any questions?**

**Call or email Client Services:**

**509-326-4054**

**[clientservices@grifco.com](mailto:clientservices@grifco.com)**

**Learn more at [grifco.com/client-portal](https://grifco.com/client-portal)**