

## Consent to Post Information on Suralink Portal

Redpath and Company, Ltd. has partnered with Suralink to provide a secure client portal for exchanging information with you during the completion of our services.

By signing this document, you understand the following:

- Redpath and Company will be requesting information to complete your tax returns, financial statements, etc. You authorize the person below to add users from your accounting team to see information on Suralink and post information to assist in the completion of your engagements. Redpath will work with this person to maintain the confidentiality of information.
- Redpath and Company will post final deliverables (such as completed tax returns, financial statements, reports, etc.) to Suralink where you will have access to view or save the documents 24/7. **Please mark your format preference below for deliverables** (choose only one):
  - A – Portal Delivery Only
  - B – Paper Delivery Only
  - C – Both Portal and Paper Delivery
- You have control over how information is shared with third parties. Suralink allows you to invite third parties to view items in the Reports section. *Warning:* Once your financial information is disclosed to a third party per your consent, we have no control over what a third party does with your information, and Redpath and Company, Ltd. is not responsible for any subsequent use or disclosure.
- You are responsible for who has access to Suralink at your organization as well as who uses, or who has access to, any user’s logins and passwords issued by Suralink.
- You are responsible for managing your passwords once you log into the site.
- If a user’s email address changes, you are responsible for notifying Redpath and Company in writing.
- If a user leaves, you are responsible for notifying Redpath and Company in writing.
- The parties listed below are authorized to approve additional users:

\_\_\_\_\_  
Name of Portal User (Please Print)

\_\_\_\_\_  
E-mail Address for This User (required)

\_\_\_\_\_  
Name of Portal User (Please Print)

\_\_\_\_\_  
E-mail Address for This User (required)

### Client Authorization of Portal Users

I hereby authorize the above portal users to be set up with access to information as noted above.

\_\_\_\_\_  
Name (Printed)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Client Name & Number (INTERNAL USE ONLY)

\_\_\_\_\_  
Client Manager Approval (INTERNAL USE ONLY)