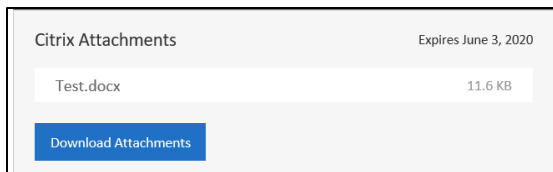


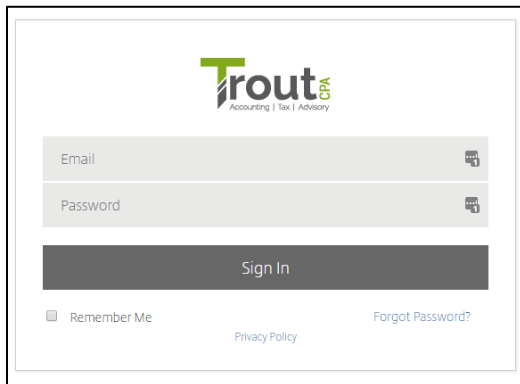
## SHAREFILE INSTRUCTIONS

### How to Open/Retrieve a File Emailed from Trout CPA Via ShareFile

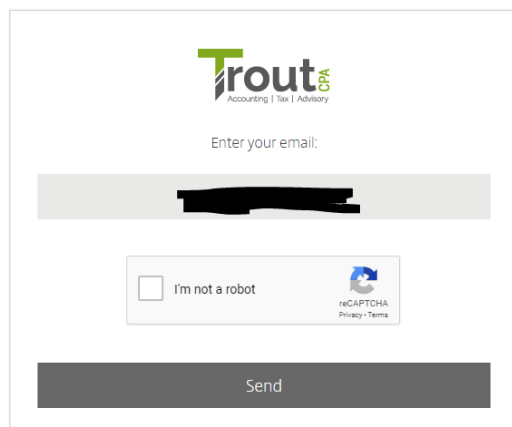
- 1) Click on "Download" or "Download Attachments" in the email.



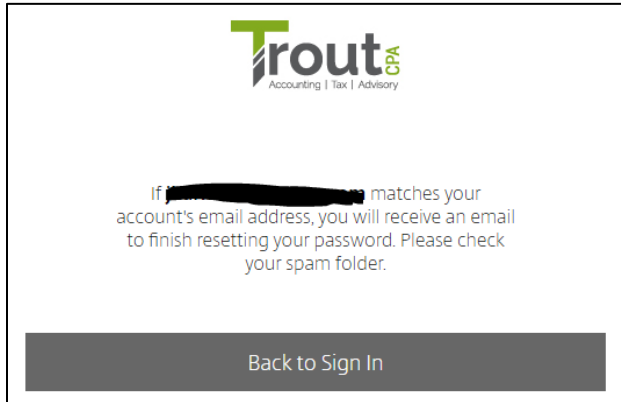
- 2) On the next screen, if an email is not already present, enter email address that the email above was sent to. If you do not have a password or cannot remember your password, select "Forgot Password". If you already have a password associated with the email, enter the password and sign in. You may proceed to [#11](#) if you are able to login into Sharefile. Otherwise, follow the next steps to reset or set up password.



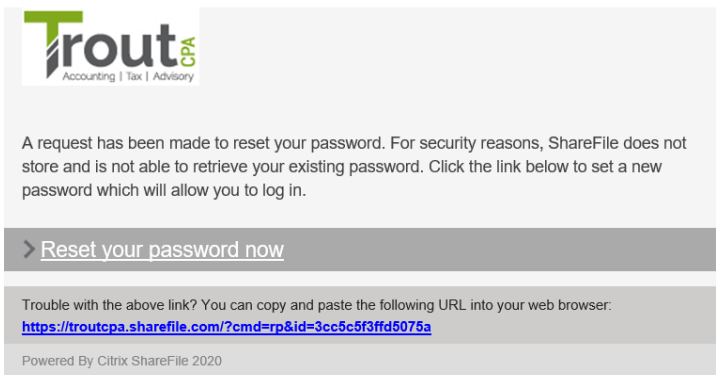
- 3) If you select "Forgot Password", the next screen will prompt you to enter your email (or it will retain the email you entered on the previous screen). Place a checkmark in the "I'm not a robot" box and then click "Send"



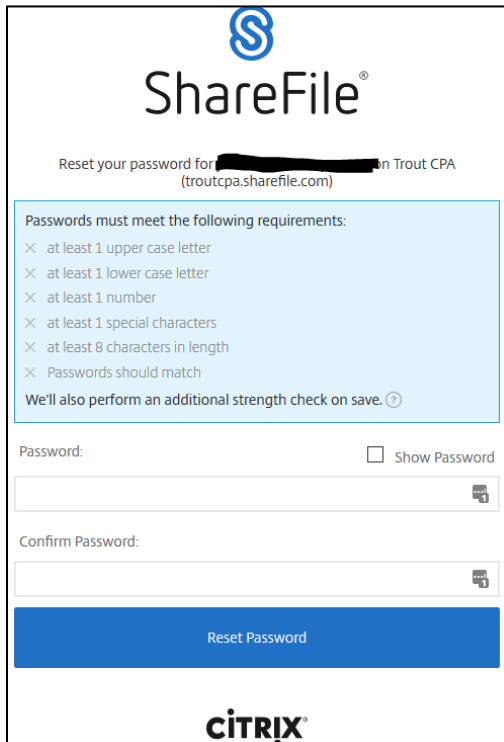
- 4) You will then see this message. Then, please check your email, including your spam folder for a message from "ShareFile Support" with the subject "Reset ShareFile Password."



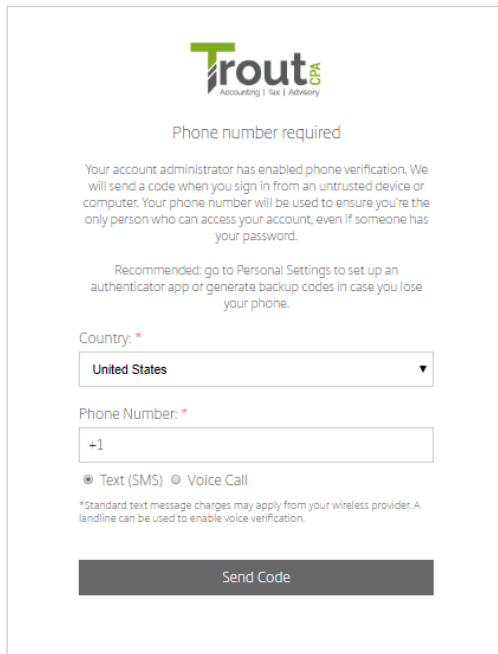
- 5) The email will have the following message. Click "Reset your password now" or copy and paste the URL.



- 6) On the next screen, create a password meeting the requirements provided and confirm your password.

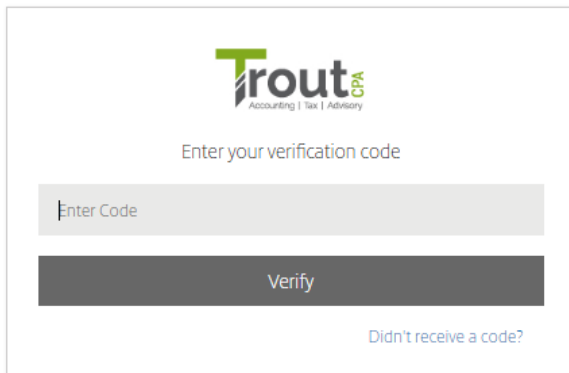


- 7) You may see the following screen to set up or reset a password. (If you do not get this screen, [skip to #10](#)). Enter a phone number (cell phone or regular phone and select Text (SMS) if a cell phone or voice call for either.) Then click “Send Code.”



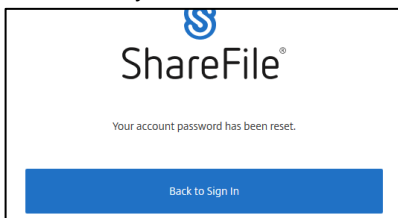
The screenshot shows the Trout CPA login page with a "Phone number required" message. The page explains that phone verification is enabled and provides instructions on how to set up an authenticator app or generate backup codes. It includes a "Country" dropdown menu set to "United States", a "Phone Number" input field with "+1" as a prefix, and radio buttons for "Text (SMS)" and "Voice Call". A "Send Code" button is at the bottom.

- 8) You will receive a call or text with a code, depending on what you select. Enter the code you received on the next screen.



The screenshot shows the Trout CPA login page with an "Enter your verification code" message. It features a large input field for the code and a "Verify" button. A link for "Didn't receive a code?" is located at the bottom right.

- 9) On the next page, there will be Terms & Conditions, select “Agree and Continue.”
- 10) If your selected password meets the requirements and it does not prompt you to enter a phone number to get a code, you will get this message. Click, “Back to Sign in” where you will be directed to ShareFile and should see the files shared with you.



The screenshot shows the ShareFile logo and a message stating "Your account password has been reset." Below the message is a blue button labeled "Back to Sign In".

- 11) Click on the file that was sent via ShareFile. Then select “Download.”
- 12) Open or Save File to your desired location and then click “ok.”