

What is Client Portal?

Client Portal is a secure, internet-based document sharing application. Using an internet browser, our office can provide our clients, partners and associates with secure, shared access to files and documents. Client Portal equips the user with basic file sharing capability via their own portal where they can upload files, download files, and view files.

Access to Client Portal is by personal invitation from our authorized firm personnel. You may request to use Client Portal by speaking to or emailing any of our staff members and/or by email to office@chasesekulich.com. When your portal is created, you will receive an invitation by email to register for your client portal. Simply click on the link and follow the instructions to register.

Once registered and logged in, you will be taken to the Client Portal home page. To upload a document(s), choose **My Documents** from the menu on the left hand side of the page. Choose the folder to which you wish to upload the document(s), if applicable, and click on the **Upload** button on the right side of the page and follow the on-screen prompts.

When a file has been uploaded for you, you will receive an email notification with a link to the Portal. Simply login using your email address and the password you set up on registration. Once you have logged in, you will be taken to the Client Portal home page. To view a document(s), choose **My Documents** from the menu on the left hand side of the page. Select the folder that contains the document, if applicable, and select the document you wish to view.

After you have registered, you can access your Client Portal at any time by typing in the following URL to your browser: <https://chasesekulich.cchifirm.ca/clientportal/> and entering your email address and password.

To ensure that you receive the various notifications from Client Portal, please add the following email addresses to your "safe senders" list:

office@chasesekulich.com
chasesekulich@cchifirm.ca

If you have any questions about the use of Client Portal, please call us at 250-287-8331 or email us at office@chasesekulich.com or ssekulich@chasesekulich.com.