

Working with the E-ORGANIZER Offered through Intuit Link

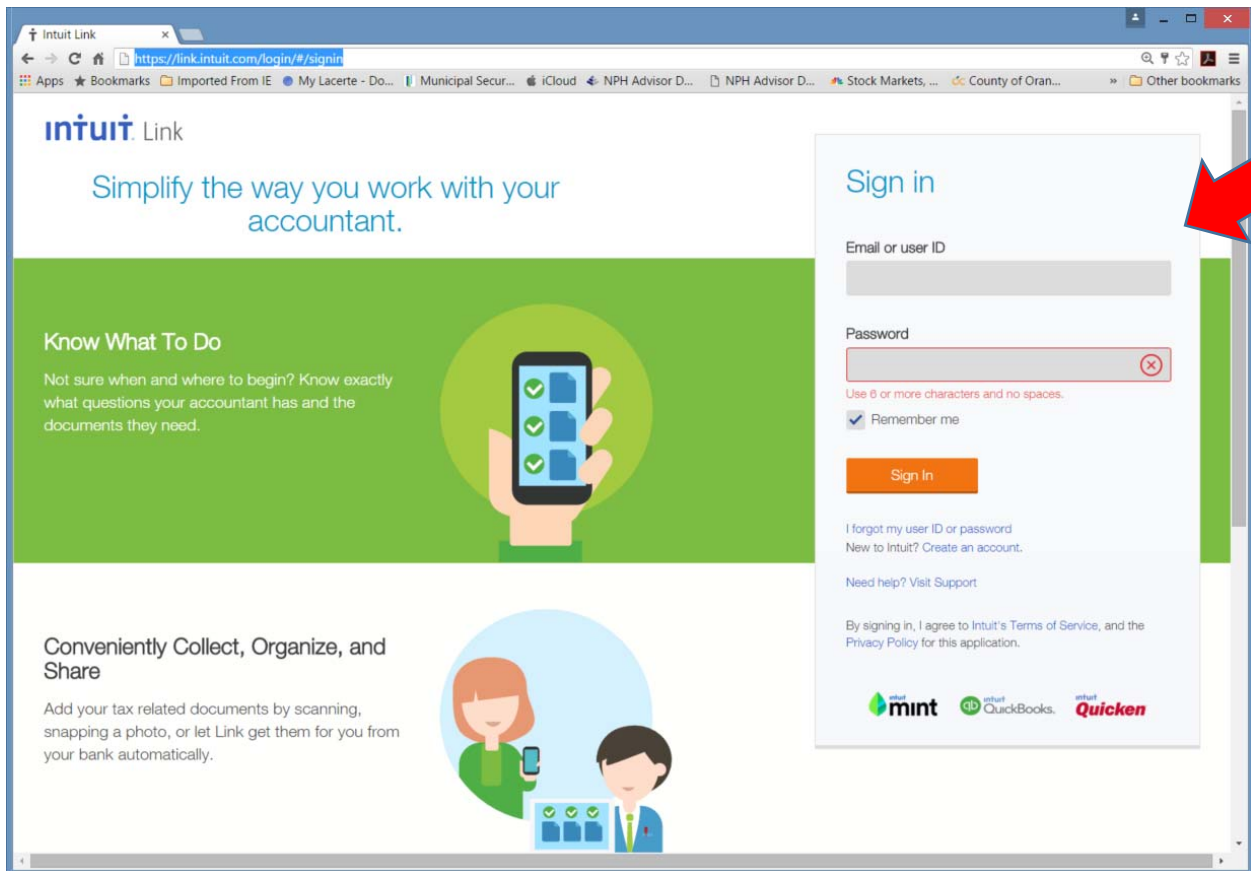
Let us know you would like to use the system, and we will send you an "Invitation" via email.

Once you have accepted the Invitation to the Intuit Link website, it will prompt you to establish a User ID and Password. From here you can continue on in the system, or leave and come back later.

If you leave, and come back later, you will need to go to the website:

<https://link.intuit.com/login/#/signin>

SIGN IN using your User ID and Password you established when you first accepted the Invitation.

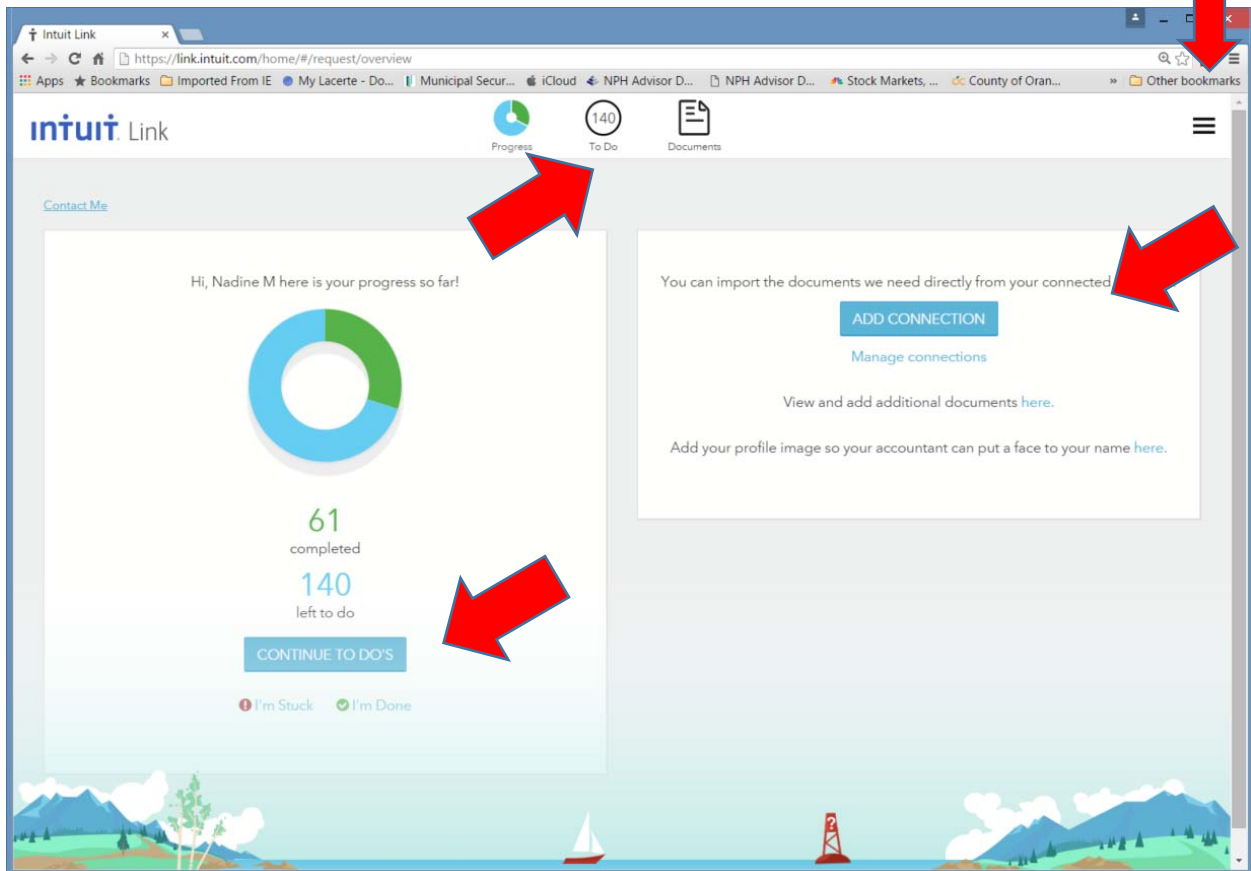


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Once you have logged in, you can

- pick up where you left off (CONTINUE TO DO'S)
- import Documents directly from your Bank or Brokerage Account (ADD CONNECTION)
- add a newly Scanned or Saved Document (DOCUMENTS)
- or simply go back to an E-Organizer Question and write a note and/or import a Document

If you need help look for the three dashes on the upper right corner



If you click on DOCUMENTS (on top), and the document you want to send is not listed, simply click on ADD OTHER DOCUMENTS (at the bottom of the Documents page).

