



Portal Authorized User Access Form

Company or Individual Name(s)

	First Name	Last Name	Email Address	Access Permanent Information (YES or NO) *
USER 1				
USER 2				
USER 3				
USER 4				
USER 5				

* Permanent Information includes sensitive data like tax returns and financial statements. You should only grant a user access to Permanent Information if you want that user to be able to view and download this confidential data.

I agree that the Portal Authorized Users listed above are authorized to access the above indicated entity on the Gilliam Bell Moser LLP (GBM) Portal and/or Sharefile platform until I provide GBM with written termination of this appointment. GBM may, without injury, act only on the instructions of any person(s) purporting to be an Authorized User as named herein, and GBM shall not be liable for any claims, expenses (including legal fees) or losses resulting from having acted upon any instructions reasonably believed to be properly authorized and genuine. I understand that only I may instruct GBM to grant, restrict or withdraw access to the GBM Portal and/or Sharefile platform. I also acknowledge that GBM reserves the right to terminate access to the GBM Portal and/or Sharefile platform for any and all Authorized Users at any time.

Taxpayer or Officer Name: _____

Taxpayer or Officer Signature: _____

Date: _____

Spouse Name **: _____

Spouse Signature **: _____

Date: _____

** For individual clients, both the taxpayer and the spouse, if applicable, must sign this form to grant Portal access.