Getting Started with Your Client Portal

A Guide to TaxDome

Welcome to Your Secure Client Portal

Your Portal, Powered by TaxDome RAI Wealth uses TaxDome as our secure client portal — giving you one place to access requests, exchange documents, e-sign forms, send messages, and complete payments from any device, anywhere.

Your portal address: raiwealth.taxdome.com

FILE UPLOADS	E-SIGNATURES	MESSAGING	PAYMENTS
Secure	**Fast**	**Encrypted**	**Easy**
Any device	Minutes, not days	No more email chains	Card or bank debit

Logging In to Your Portal

First Time Logging In? Before your first login, check your email for an invitation link from RAI Wealth. Click the link to activate your account and set your password. After activation, use the web address or mobile app for all future logins.

You can access TaxDome in two ways: through a web browser on your computer, or through the mobile app on your phone or tablet.

Option A — Web Browser (Desktop or Laptop):

1. Open any web browser (Chrome, Safari, Edge, or Firefox).
2. Navigate to: raiwealth.taxdome.com
3. Enter your email address and password, then click Sign In.
4. Enter the one-time verification code sent to your email.
5. Enter your PIN if prompted (first-time users only — see Portal PIN section below).

Option B — Mobile App (iPhone or Android):

1. Download the TaxDome Client Portal app from the Apple App Store or Google Play Store.
2. Open the app and enter your email address and password.
3. Enter the one-time verification code sent to your email.
4. Enter your PIN if prompted (first-time users only — see Portal PIN section below).

Skip the Email Code for 30 Days After entering your email verification code, check the box that says Remember this device for 30 days. This will allow you to skip the email code step on that device for the next 30 days — making future logins much quicker.

Password Requirements

When creating or resetting your password, it must meet all of the following requirements:

Requirement	Details
Minimum Length	At least 12 characters total
Special Characters	Must include at least 2 special characters (e.g. !, @, #, $, %)
Numbers	Must include at least 2 numbers (0 through 9)
Example	RAIWealth@2026! meets all requirements

Forgot Your Password? Click Forgot Password on the login screen at raiwealth.taxdome.com and a reset link will be sent to your email address. Do not share your password with anyone, including our team.

Two-Factor Authentication (2FA)

By default, TaxDome sends a one-time verification code to your email each time you log in. This is the standard experience for all new RAI Wealth clients — no additional app or setup is required.

New Clients — No Action Needed If you are a new client, you will automatically receive your verification code by email every time you log in. You do not need to download or set up any authenticator app.

Existing Clients — Authenticator App If you previously enabled an authenticator app (such as Google Authenticator, Microsoft Authenticator, or Twilio Authy) on your account, you will continue to be prompted for a code from that app when logging in. If you would prefer to switch back to the simpler email code method, you can toggle this off in your personal account settings, or contact RAI Wealth and we can reset it for you.

Trouble Receiving Your Code or Locked Out? Contact the RAI Wealth team directly and we will assist you in restoring your portal access as quickly as possible.

Your Portal PIN

First-Time Users Only You will be prompted to create a PIN when activating your account for the first time. If you have logged in before, you will not need to set up a PIN again. Note: mobile app users will be prompted for their PIN each time they open the app as an added layer of security.

PIN Detail	What to Know
When is it created?	During your first-time account activation only
Web browser users	PIN required on first login only
Mobile app users	PIN required each time you open the app
Forgot your PIN?	Contact RAI Wealth and we will help you reset your access

Your Login Flow at a Glance Email + Password → One-time code sent to your email → PIN (first-time only) → You are in your TaxDome portal

Your Home Dashboard

Once logged in, you will land on your Home page — your command center for everything that needs your attention. Any item requiring action will appear here first.

Portal Section	What You Will Find
Home	Your full to-do list: pending files, invoices, chats, and organizers
Documents	Upload, view, download, and manage all your files
Chats	Secure chat threads with the RAI Wealth team
More	Organizers, Billing, Proposals and EL's — all found under the More menu

Completing Your Organizer

When RAI Wealth needs information from you, we will send you an organizer — a digital form tailored to your specific situation. You can find your organizers under the **More** menu in the portal.

1. Look for a notification on your Home page or in your email indicating an organizer is ready.
2. Navigate to More and select Organizers to open it.
3. Answer the questions that apply to your situation. Some questions may appear or disappear based on your previous answers — this is intentional.
4. Your answers save automatically as you go. Log out and return at any time — there is no need to finish in one session.
5. Click Submit when finished. The RAI Wealth team will be notified immediately.

Returning Client? Fields like your name and contact details may already be pre-filled. Simply review and update anything that has changed since your last submission.

Uploading Files

1. From your Home page, click Upload Files — or navigate to the Documents section in the menu.
2. On mobile: tap Upload and use the built-in document scanner to photograph your files. The app automatically cleans the image and converts it to a PDF.
3. On desktop: drag and drop files into the upload area, or click Browse to select files from your computer.
4. Confirm the upload. RAI Wealth has instant access as soon as your files are submitted.

> **Mobile Scanner Tip** Use the TaxDome app's built-in scanner rather than a plain photo. It corrects angles, improves image quality, and produces clean PDFs — helping our team process your files faster.

Reviewing and E-Signing Documents

E-signing is fully digital and legally binding — no printing, scanning, or office visits required.

How You Will Be Notified:

Notification Method	What to Do
Portal Home Page	A Sign Document task appears in your to-do list — click it to open
Email Notification	Click Review & Sign in the email — note: this link expires after 7 days
Documents Section	Navigate to Documents and look for items with a Pending Signature status

Signing on Desktop:

1. Open the document from your Home page to-do list, the Documents section, or the email link from RAI Wealth.
2. First-time signers: read the Electronic Signatures Disclosure, check the agreement box, and click Continue.
3. Click Start (top right corner) to begin the signing process.
4. Read through the document in full.
5. Click each highlighted signature field to place your signature. The first time, you will type or draw your signature and initials — these are saved and reused automatically for all future documents.
6. Use the Next button to move to the next required field. All fields must be completed before submitting.
7. Once every field is filled, click Finish. The signed document is returned to RAI Wealth instantly.

Signing on the Mobile App:

1. Open the TaxDome app and tap the document showing a Pending Signature status on your Home page.
2. Tap Continue to open the document for review.
3. Tap Begin Signing to highlight all fields that require your signature.
4. Tap each highlighted field to sign. Enable Insert Signature on All Fields to apply your signature to multiple fields at once.
5. Tap Next Field to move through the document.
6. Once all fields are complete, tap Finish.

Your Signature is Saved After the First Use You only need to draw or type your signature once. After that, it is stored securely and automatically available for all future signature requests.

Email Link Expired? The Review & Sign link in your email is valid for 7 days. If it has expired, log in to the portal at raiwealth.taxdome.com — your document will still be waiting in the Documents section with no expiration.

Joint Returns (Married Filing Jointly)

If you and your spouse are filing jointly, both of you must sign the documents separately.

1. Each spouse will receive their own email with a unique Review & Sign link.
2. Each spouse opens their own link and signs only their designated signature fields.
3. The document will show Partially Signed until both spouses have completed their signatures.
4. Once both spouses have signed, the document status updates to Signed and the process is complete.

Sharing One Email Address? If both spouses use the same email address, you will receive two separate signature request emails. Complete the first spouse's signature, then open the second email and complete the second spouse's signature separately.

Chats — Secure Messaging

1. Click Chats in the portal navigation menu.
2. Select an existing thread to reply, or start a new chat with the RAI Wealth team.
3. Type your message and attach any relevant files directly within the chat.
4. Send — our team will receive an instant notification and respond promptly.

Why Use Portal Chats Instead of Email? Messages through TaxDome are end-to-end encrypted, never lost in spam folders, and keep your full conversation history organized in one searchable place.

Paying Invoices

You can find your invoices under the **More** menu in the portal.

1. Navigate to More and select Billing, or click the invoice alert on your Home page.
2. Select the invoice(s) you wish to pay.
3. Enter your credit card or bank account details.
4. Submit — you will receive a payment confirmation immediately.
5. View your complete payment history anytime under More then Billing.

> **Your Payment Information is Protected** Your card or bank details are used only to process the transaction and are never stored on our servers.

Proposals and EL's

Your engagement letters and proposals are available under the **More** menu in the portal.

1. Navigate to More and select Proposals and EL's.
2. Review any open proposals or engagement letters sent by RAI Wealth.
3. Click to open, review the document in full, and sign or approve as directed.
4. Once signed, the document is returned to our team instantly.

Security at a Glance

ENCRYPTION
Bank-Level
All data protected in transit

CERTIFICATION
SOC 2 Type II
Industry gold standard

AUTHENTICATION
Multi-Layer
Password + Email Code + PIN

Need Help?

The RAI Wealth team is always here for you. If you have trouble logging in, completing a signature, or using any feature in the portal, reach out through secure chats or via your usual contact information.

Resource	Where to Find It
RAI Wealth Client Portal	raiwealth.taxdome.com
TaxDome Client Help Center	client-help.taxdome.com
Secure Chats	Chats section inside your portal

IMPORTANT DISCLOSURES

This guide is prepared by RAI Wealth to help clients navigate the TaxDome client portal. TaxDome is a third-party platform operated by TaxDome Inc.; features and interface are subject to change. For technical issues with portal access, please contact RAI Wealth directly. All data exchanged through TaxDome is subject to TaxDome's security and privacy policies. E-signatures completed through TaxDome are legally recognized in the United States and many other countries.