LKR Client Portal Frequently Asked Questions

I've forgotten my log in credentials, what can I do?

- If you remember your user name, you can use the 'forgot password' link on the Portal log in page. A temporary password will be sent to you via e-mail.
- If you cannot remember your user name or password, please call 336-274-3700 for assistance.

Can I change my log in credentials?

- Yes. Once you have signed in, click on your name in the upper right corner of the screen to access a drop down menu to edit your account (change log in and name on account if desired), update your password, or set security questions that you can be asked if you have forgotten your password.

Where are my folders?

- Click the File Exchange link on the left side of the screen to view your Perm, Temp, and Tax Organizer (individual clients only) folders.

Why is the 'date modified' column not current?

- The date modified column pertains to the date the folder itself was created and does not update as information is uploaded. This date can be disregarded.

Where can I get a copy of my tax returns and/or financial statements?

- Current and prior years' completed tax returns and financial statements are in your Perm folder.
    - Draft copies of tax returns and/or financial statements may be uploaded for you to review before they are finalized. If you are notified by one of our staff that a draft copy is on the Portal, check your 'Temp' folder.

How long is information stored in my folders?

- Completed tax returns are available in your Perm folder indefinitely for as long as you remain a client. Information in the Temp folder is automatically deleted after 14 days.

How can I upload information?

- Click the 'Temp' folder and look for an 'upload' button at the top of the screen. You can either drag and drop files to the upload dialog box or use the 'add files' link within the box to add them from a saved location on your computer. Click 'start upload' when you have added all of your files.
    - A member of our administrative staff receives notifications of anything that is uploaded, so the information can be forwarded to the appropriate individual.

Can I send information to a banker that has requested it?

- Yes, you can save any of the pdf files you need and forward them to your banker as an email attachment, or print and deliver to the bank if desired. Please note that due to IRS regulations, Leeper, Kean & Rumley cannot send copies of your personal information to any third party.