



HubSync Portal Registration

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Invitation email

Example of the invitation email to create a password for portal.


Please follow on screen prompts to create your secure account.

CRI Family of Companies <no-reply@hubsync.com>

To: You



Thu 11/21/2024 7:59 PM

HubSync | 



Why did you receive this email? Here is a quick reminder. CRI Family of Companies is excited to introduce HubSync, a platform that streamlines how you interact with your advisor, reducing the need for multiple logins, portals, and touchpoints. **What do I do next?** Creating your password is the first step in accessing your HubSync workspace.

[Create Your Password Now](#)

Please use the link above to create or recreate your password.
Do you still have questions? Check out our [Client Resources](#) page on [CRLady.com](#).

To help protect your HubSync password, please do not forward this email or share your account information with anyone else.

Legal Notice : [Privacy Policy](#) | [Terms of Use](#)

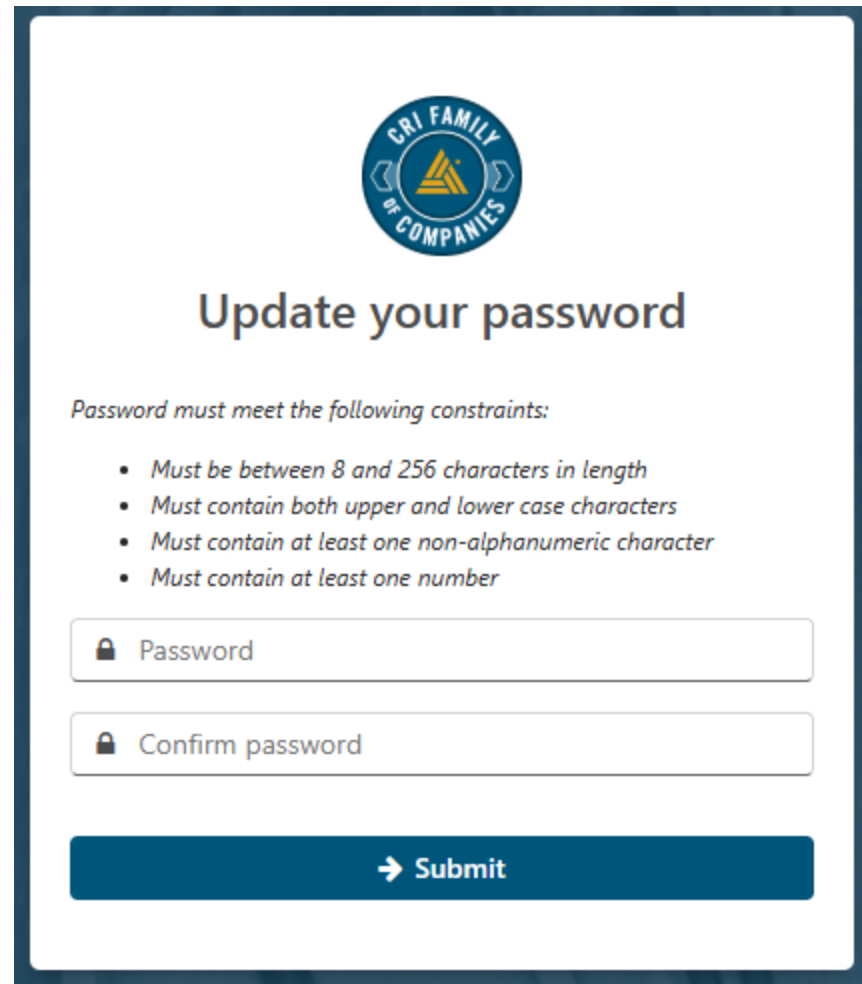
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Invitation email – create password


Your portal username is your email address at which you received the invitation.

To finish creating your account, enter a password that meets all of the requirements listed.

Click "Submit"




The screenshot shows a web form titled "Update your password" with the CRI Family of Companies logo at the top. Below the title, it lists password constraints: length (8-256 characters), case requirements (upper and lower case), non-alphanumeric character, and a number. There are two input fields: "Password" and "Confirm password", both with lock icons. A blue "Submit" button with a right arrow is at the bottom.





Update your password

Password must meet the following constraints:

- *Must be between 8 and 256 characters in length*
- *Must contain both upper and lower case characters*
- *Must contain at least one non-alphanumeric character*
- *Must contain at least one number*

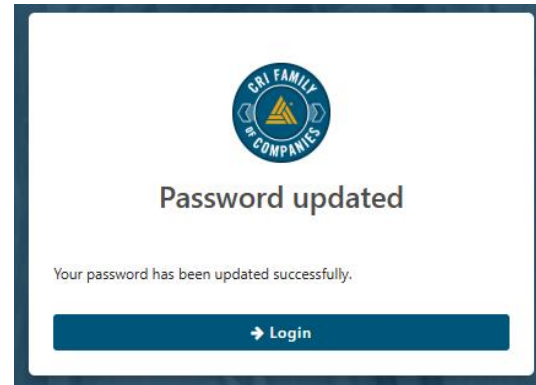
 Password

 Confirm password

 Submit

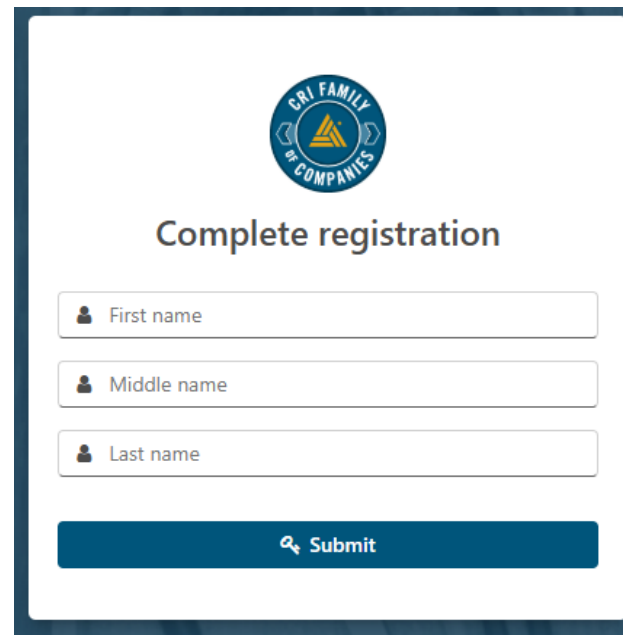
Complete Registration

Confirmation of password updated will be displayed on the next screen with request to Login.



The screenshot shows a confirmation screen with the CRI Family of Companies logo at the top. The main heading is "Password updated". Below it, a message states "Your password has been updated successfully." At the bottom, there is a dark blue button with a white right-pointing arrow and the text "Login".

Next screen will ask for your First, Middle and Last Names



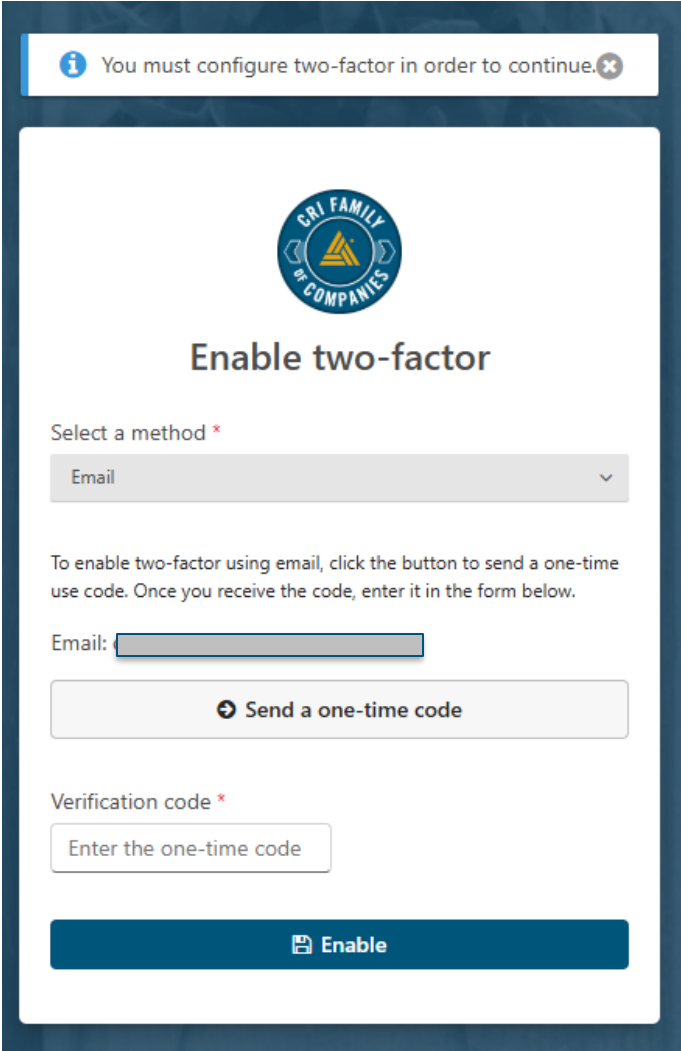
The screenshot shows a registration form with the CRI Family of Companies logo at the top. The main heading is "Complete registration". Below the heading are three input fields, each with a person icon on the left and a label: "First name", "Middle name", and "Last name". At the bottom, there is a dark blue button with a white right-pointing arrow and the text "Submit".

Enable two-factor authentication

For your security, two-factor authentication factor must be established.

Select a method from the drop-down menu – Email or SMS

Click on Send a one-time code and verification code is received, input in the box provided and click "Enable".



The screenshot shows a web interface for enabling two-factor authentication. At the top, a dark blue header contains the CRI Family of Companies logo and the text "Enable two-factor". Below the header, a white box contains the following elements:

- An information icon and the text: "You must configure two-factor in order to continue." with a close button (X).
- The CRI Family of Companies logo.
- The heading "Enable two-factor".
- A label "Select a method *" followed by a dropdown menu currently showing "Email".
- Instructional text: "To enable two-factor using email, click the button to send a one-time use code. Once you receive the code, enter it in the form below."
- An "Email:" label followed by an empty text input field.
- A button with a circular arrow icon and the text "Send a one-time code".
- A label "Verification code *" followed by a text input field containing the placeholder "Enter the one-time code".
- A large blue button with a white document icon and the text "Enable".

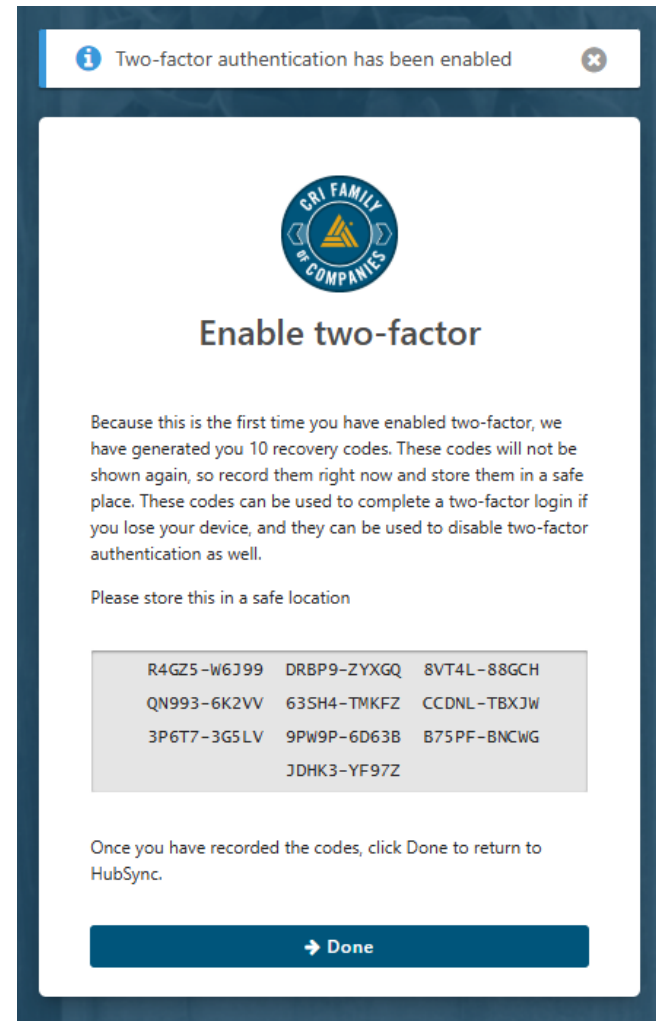
Two-factor authentication recovery codes

System will produce ten recovery codes for your safekeeping in the event you lose your device.

Please store these in a safe location.

Click "Done" to complete your registration and access your client portal.

Note that you will be prompted to accept CRI Family of Companies Acceptable Use Terms and Policy.

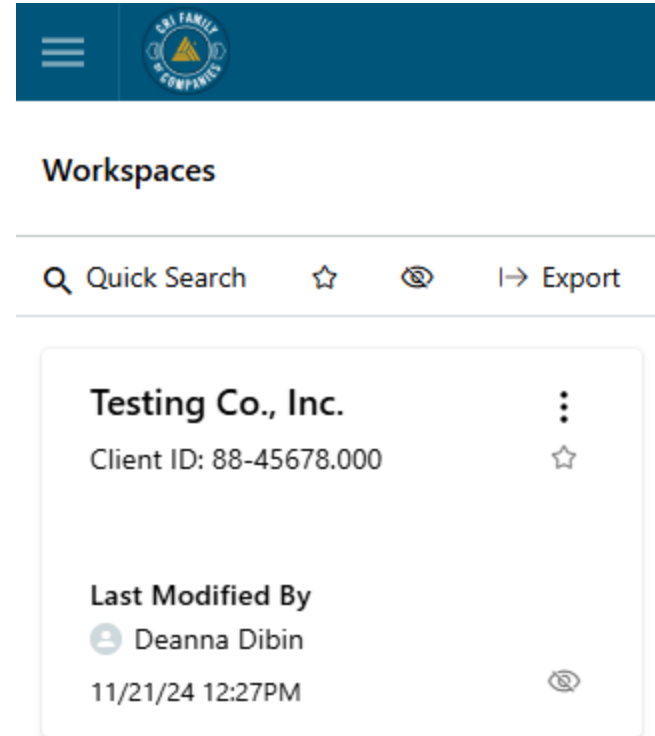


Example of Portal

Your workspace will be displayed as the one shown on this page.

Please note that if your email address is associated with multiple client relationships with CRI Family of Companies, and you get invited to all of those with the same email address, you will see all of your workspaces in one place.

Examples: taxpayer with children or associated entities group.



The screenshot shows the top navigation bar of the CRI Family of Companies portal. It includes a hamburger menu icon, the CRI Family of Companies logo, and a dark blue background. Below the navigation bar, the heading "Workspaces" is displayed. A search bar with a magnifying glass icon and the text "Quick Search" is present, along with a star icon, a lock icon, and an "Export" button with a right-pointing arrow. The main content area displays a workspace entry for "Testing Co., Inc." with a client ID of "88-45678.000". Below this, it shows the "Last Modified By" information: "Deanna Dibin" with a user icon and the date "11/21/24 12:27PM". Action icons for a vertical ellipsis, a star, and a lock are visible on the right side of the workspace entry.

HubSync workspace invitation

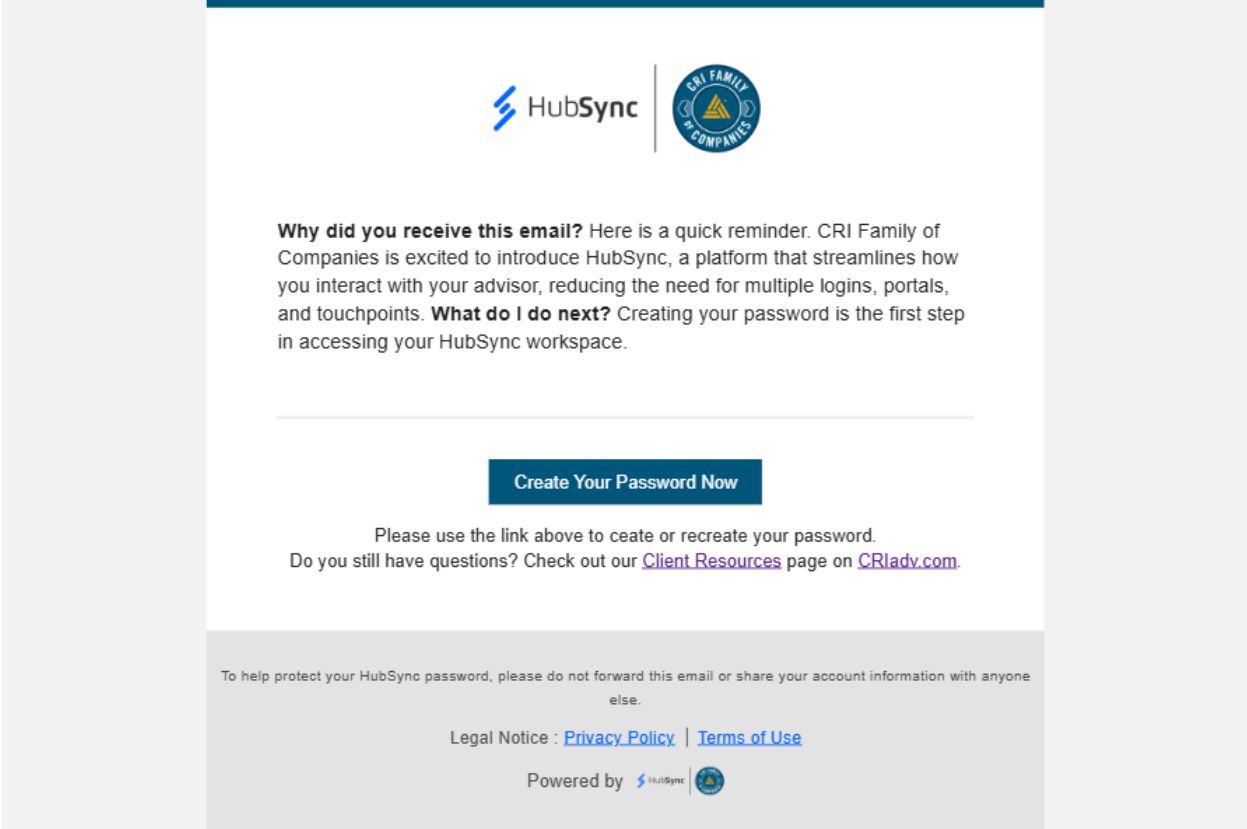
- Example of workspace invitation email is displayed on this page.
- Please follow on screen prompts to create your secure account.
- Existing registered users will need to login to view all HubSync workspaces they've been invited to.

CRI Family of Companies <no-reply@hubsync.com>


To: You

← ↶ ↷ ☰ ...

Thu 11/21/2024 7:59 PM



The screenshot shows an email from CRI Family of Companies. At the top, there are the HubSync logo and the CRI Family of Companies logo. The main text explains that the company is excited to introduce HubSync, a platform that streamlines interaction with advisors. It asks the recipient to create a password as the first step. A prominent blue button labeled "Create Your Password Now" is centered below the text. Below the button, there is a note to use the link above and a link to "Client Resources" on "CRLady.com". At the bottom, there is a security warning not to forward the email, followed by "Legal Notice" links for "Privacy Policy" and "Terms of Use", and a "Powered by" logo for HubSync.

HubSync | 


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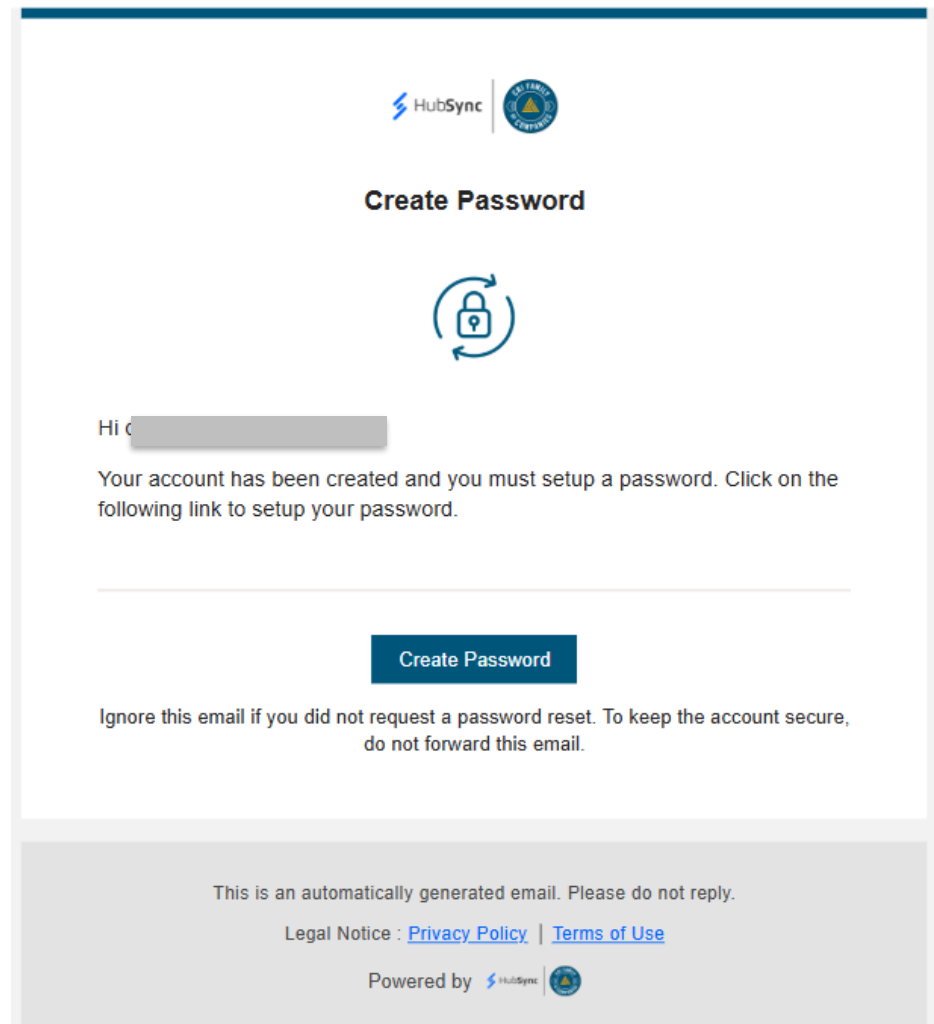
To help protect your HubSync password, please do not forward this email or share your account information with anyone else.

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HubSync – resent invitation

- If the original invitation email was misplaced, the invitation will be resent.
- Example of this resent invitation email notification is presented here.
- Please follow on screen prompts to create your password to access your HubSync workspace(s).
- Registered users will be able to view all HubSync workspaces they've been invited to with the same email address.





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