

# Quick Reference Card: K-1 Delivery Portal

## User Registration

1. From your browser, navigate to the URL below:  
<http://www.ataxfund.com/investors-brokers/k1-information/>
2. Click on the link to download your 2017 Schedule K-1. This will redirect you to the K-1 delivery portal.
3. To create an account using your PIN provided on your Schedule K-1, click "Register here"  
**Note:** If you created an account last year, you will receive an email communication from ATAX with your username and password to login. Please skip to the "Viewing Documents" section.



4. A registration screen will appear. Proceed with populating each of the applicable fields.

**Note:** Your partner ID is your EIN/SSN without any special characters (i.e. "-") and your PIN has been provided to you on your Schedule K-1  
**Please note that these fields are case sensitive.**



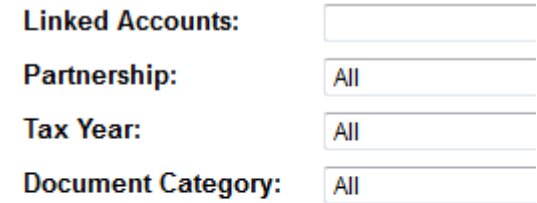
5. Once you have populated all applicable fields, click "Submit", and check your email for a confirmation that your registration was successful.

**Note:** This is a one-time process. Your username and password will be used for all future access.

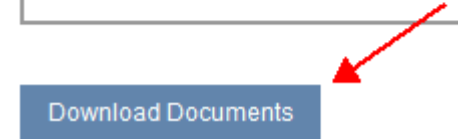
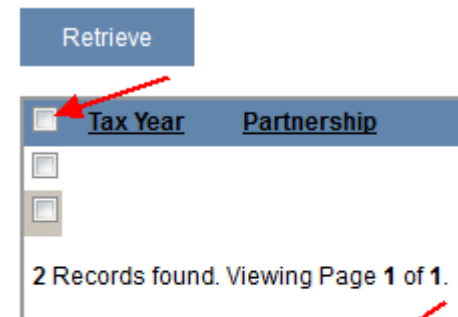
## Viewing Documents

1. Once logged in, navigate to the Download Documents tab on the top menu bar.
2. Click "Retrieve" to see a listing of all documents.

**Note:** you can limit the scope of the retrieval process by adjusting the Linked Accounts, Partnership, Tax Year, and/or Document Category filter values.



3. Click the checkbox next to the documents you would like to view/download, and click "Download Documents".

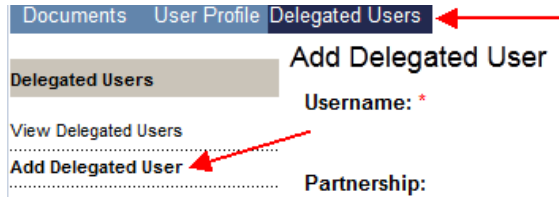


4. You will be prompted to either open or save the file(s) to your computer.

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## Adding Delegated Users

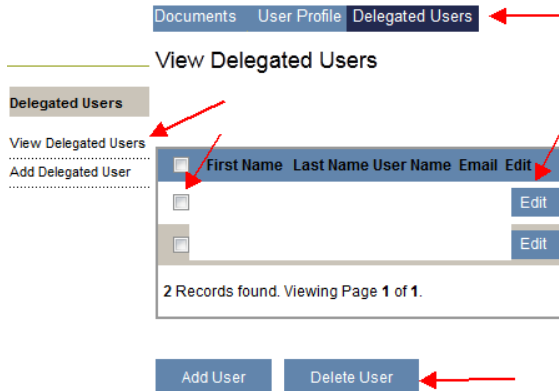
1. You have the ability to allow additional users (i.e. your accountant, financial advisor, attorney, etc.) access to your data. To do so, click the Delegated Users tab.



2. Along the left menu bar, click Add Delegated User.
3. Follow the on-screen options to select the applicable information you want your Delegated User to access.

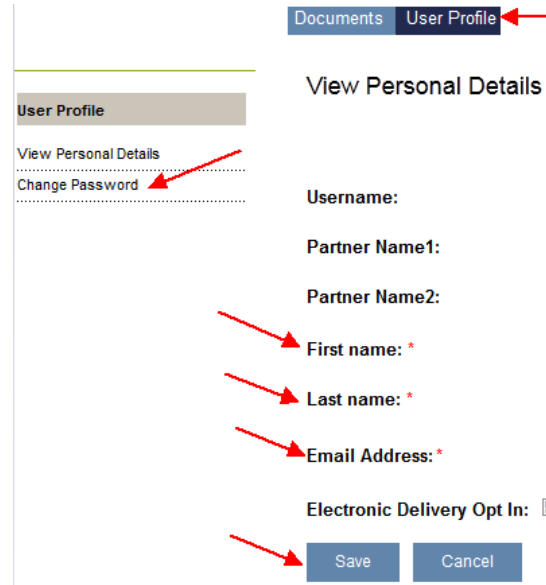
**Note:** The Delegated User will receive an email with a link to the website, the username you created, and a system-generated password.

4. If you need to edit or delete a Delegated user, click View Delegated Users on the left menu bar and follow the on-screen options.



## Editing Your Email Address & Password

1. You have the ability to edit your first/last name, email address, and password. To do so, click the User Profile tab.



2. To change your first name, last name, and/or email address, click Edit at the bottom of the page, make your edits in the applicable fields, and click Save.

**Note:** Changes you make to your User information will only be changed in the portal.

3. To change your password, click Change Password on the left menu bar, and follow the on-screen options.