



ACCOUNTING • TAX PREPARATION
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FINANCIAL ADVISING

MCLR FINANCIAL CENTER

G-4454 SOUTH SAGINAW STREET
BURTON, MICHIGAN 48529-2067
(810) 744-3541 • FAX (810) 744-4806

www.mclr.net

JAMES I. MANN (1929-1991)
STEVEN A. COATES, ABA
DAVID W. LONGROY, EA, ATA, ATP
STEVEN R. RAINEY, ABA, RR, EA

Request a NetClient CS Account

When your NetClient CS account is created, you will receive an email inviting you to create your Thomson Reuters Account. (Thomson Reuters manages our portals.) Click the link provided, enter your email address as your login, and provide a new password. You will also be required to setup 2-Factor Authentication using a text or voice call, an authenticator app, or a hardware key. Once your account is registered, you will be able to access your secure portal by going to www.MCLR.net and clicking on **Login**.

First Name _____ Last Name _____

e-mail address _____

Phone Number _____ Alternate Phone Number _____

Best methods and times to reach you _____

For security purposes, please provide the following to confirm your identity:

(We may contact you for additional confirmations.)

Birth Date ____/____/____ Last 4 digits of your Social Security Number ____-____-____

By default, we give you access to recent individual tax returns through your NetClient CS account.

☐ Check here if you wish to exclude your individual income tax returns from NetClient CS.

Please identify any businesses for which you also request access to records we may release to the portal:

Legal Business Name¹ Entity Type² Reason for Authority³ Federal ID Number⁴

A _____

B _____

C _____

¹For individuals, please provide the assumed name ("dba"). For all other entities, please provide the legal name.

²Specify Individual or specific legal form of the entity (e.g. LLC, Corporation, Partnership, Trust, Estate)

³Indicate your relationship to the business that provides you the authority to represent the business (e.g. Owner, Member, President, Secretary (Corporate), Treasury, Partner, Trustee, Executor, Attorney)

⁴Generally, this is the Employer Identification Number (EIN) for the business

I acknowledge receipt of the MCLR Website and Web Portal Usage Policy ("Policy"), which is incorporated here by reference, as may be modified in accordance with the Policy, and agree to be bound by its terms. I understand that MCLR Financial Center may refuse or terminate my access to their Web Portals at any time for any reason.

I declare that the personal information provided above is complete and accurate, and is offered voluntarily at my own risk. I further declare that I have the legal authority to represent every business identified above and receive confidential information about the same.

Signature _____ Date _____

Due to the sensitive nature of information on this form, we recommend submitting it by fax, mail, or in person!

For MCLR Use: ZZ: _____ A: _____ B: _____ C: _____ D: _____

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