

Thank you for choosing to collaborate with PBMares and Box. The video and this transcript is for clients who are setting up their Box account for the first time.

Box is a simple and trusted way for us to securely share files and documents with you. Setting up a Box account is always free.

To get started, follow these steps.

1. **Look for an email from noreply@box.com with an Invitation to Collaborate.** This will enable you to view and download your documents from PBMares. This email is not spam or phishing. If you want to be sure, please confirm with your service provider.
2. **When you receive the Invitation to Collaborate email from noreply@box.com,** click *Accept the Invite* to get started.
3. **On the next screen, enter your first and last name in the first section.** Then, enter your email address (which may already be populated), and then create a password. Enter the password in both the third and fourth sections.

Please note: your password must meet Box security requirements. The dots under both password fields will be green when you have a matching password that follows Box's requirements for length, upper- and lowercase letters, numbers, and so on.

4. **After you filled out your name, email, and password,** look for a confirmation email within a few minutes. When you receive it, click *Verify Email*. You will then have access to your document(s).
5. **To access your shared document(s),** click on the blue *Get Started* button on the bottom left of your screen. Then, you'll be able to view any files that are available for you to open, share, or download.

Files in Box do not have an expiration date; however, we recommend that you download your file(s) immediately and save them to your own computer for easy access later.

If you have further questions about Box, please reach out to your service provider.

We look forward to collaborating with you this tax season. Thank you for choosing PBMares!