

Kassouf app

Quick Start Guide

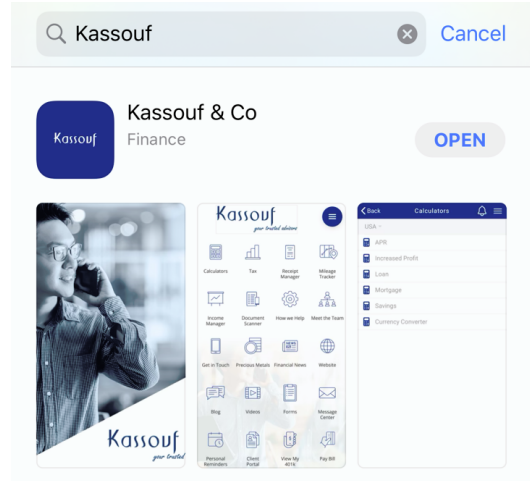


Get the App

Download the App

Download the app by searching Kassouf via the Apple App Store or Google Play Store.

STEP
01



STEP
02

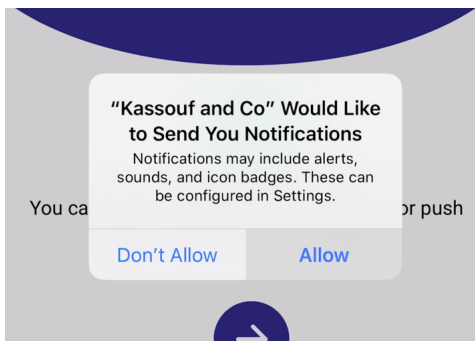
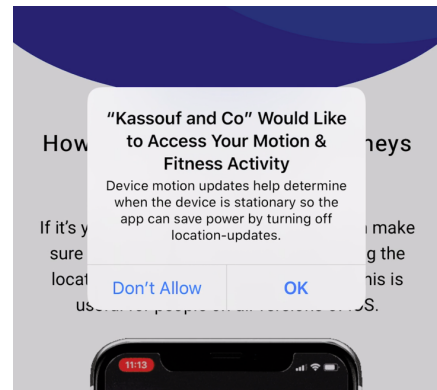
Create Account

Enter your primary email address to create your account. Create a password and enter your name.

Disable Tracking

You don't need tracking info to use the app, so select Don't Allow when prompted.

STEP
03



STEP
04

Allow Notifications

We'll use push notifications to send important info.

Explore the App

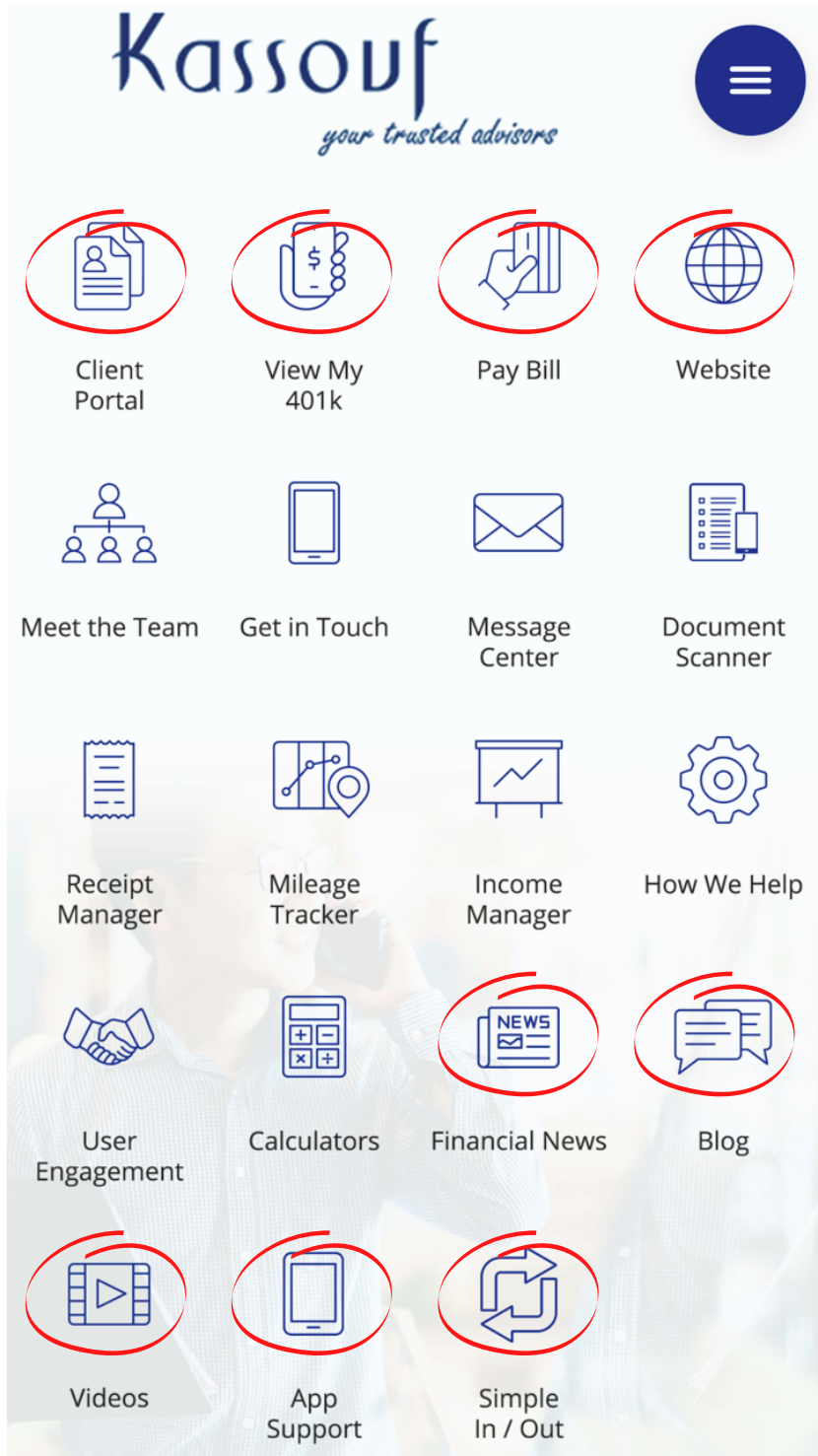
Click around the app and learn about its features.

STEP
05



App Features

Web Directed Services

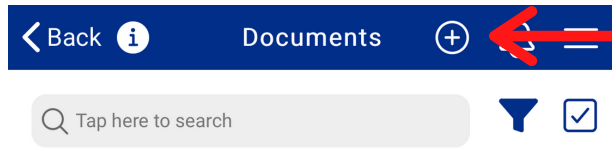


The circled services here all link to a related webpage. For example, View My 401k goes directly to the 401k website that's also linked on kassouf.com.

These buttons are essentially an easier way for you to access frequently used services on the website in a more mobile-friendly manner.

App Features

Document Scanner, Receipt Manager, Income Manager

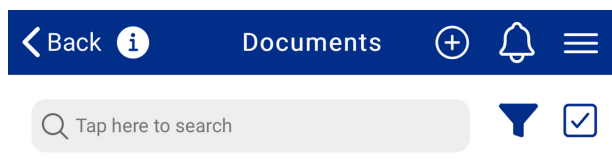
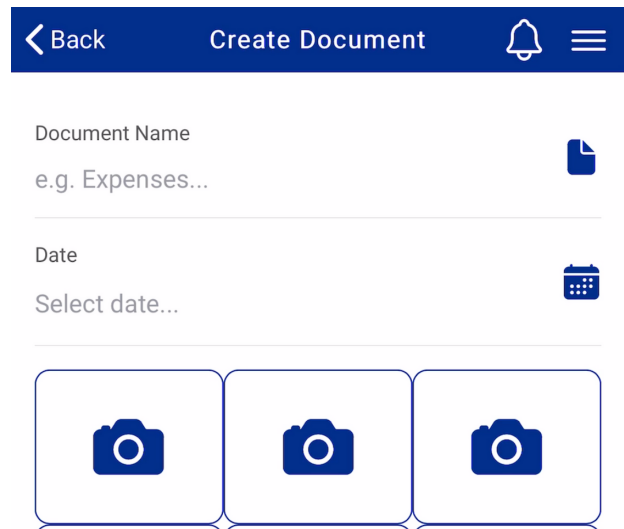


Add your file by clicking the plus sign at the top of your screen.



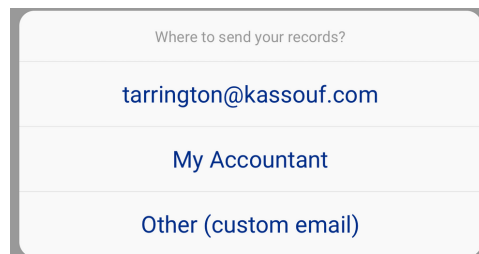
No Records Found

Name your file, select a date, then either take a photo of the document or select photos from your camera roll. You can select multiple photos.



Your document will now appear in the Documents list in the scanner widget. If you're using Receipt Manager, the file will appear there, and so on for Income Manager. Click on it to send it to a service group or person.


Click Export. You can select your email or enter a custom email. My Accountant will take you to Kassouf's locations/service areas, which will be routed to the appropriate groups.





App Features


Document Scanner, Receipt Manager, Income Manager


Select Office Location ✕


Birmingham - Main Office
2101 Highland Ave
S Ste 300 Birmingham 35205-4009 

Auburn
570 Devall Drive
Suite 305 Auburn 

Orange Beach
4547 Cypress Village Blvd
Orange Beach 

Baton Rouge
2900 Westfork Drive
Suite 401 Baton Rouge 

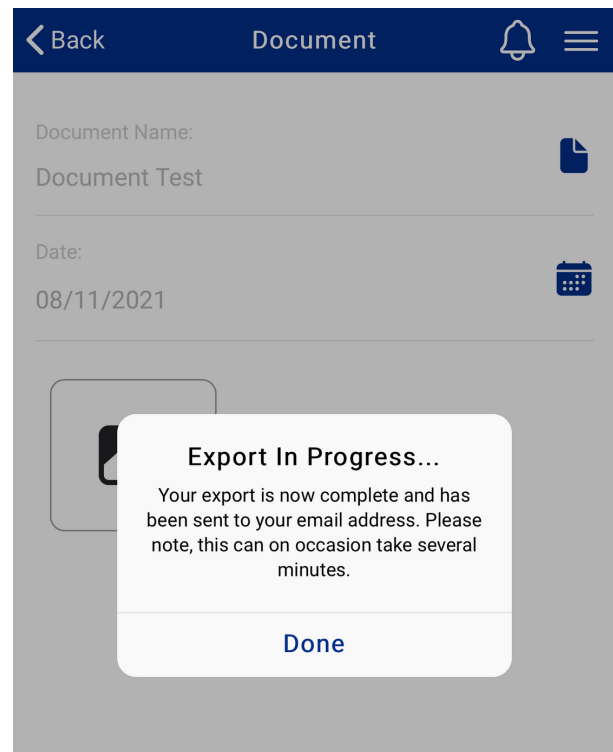
Kassouf Wealth Advisors
2101 Highland Avenue
South Suite 650 Birmingham 

Kassouf Retirement Plan Services
2101 Highland Avenue
South Suite 300 Birmingham 

If you select My Accountant, this is the screen you'll see. You can select a location or a department.

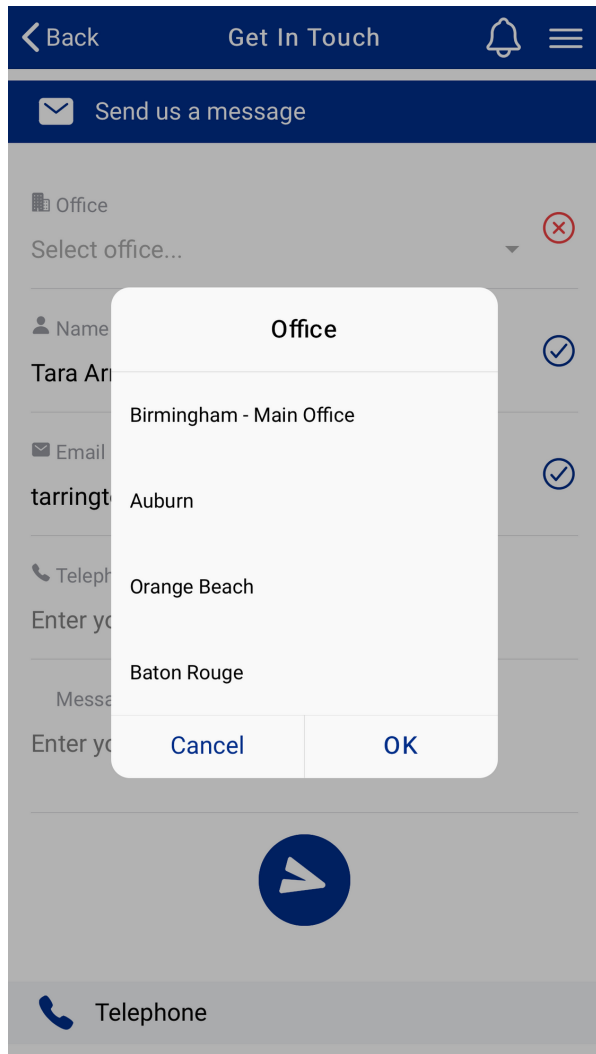
The message will go to the appropriate email distribution list.

Your document will now be sent to the appropriate person/group. You can select Done when you receive this message.



App Features

Get in Touch



This message feature is similar to the document scanner. You must select an office location for your message.

In addition to locations, you'll see relevant departments to better help you direct your message.

Like the document scanner, these will be routed through distribution lists to the appropriate staff.

Client Authentication

Once you download the app using your primary email address, your client account will be authenticated. Please make sure you use your primary email address to make sure our information is accurate.

Once you receive a message in the app verifying the authentication, the process is complete.

Kassouf app

Questions? Comments?
Concerns?

Email kma@kassouf.com

