Kassouf

Quick Start Guide

	Kass	OU your trusted	advisors
	Client Portal	View My 401k	Pay Bill
N	A A A leet the Team	Get in Touch	Message Center
	How we Help	Blog	Videos
	Calculators	Тах	Receipt Manager
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Get the App

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Download the App

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

Welcome to the

Kassouf & Co App



Create Account

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

tarrington@kassouf.com

Disable Tracking

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

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"Kassouf and Co" Would Like to Send You Notifications Notifications may include alerts, sounds, and icon badges. These can be configured in Settings. Don't Allow

Allow Notifications We'll use push notifications to send important info.

Explore the App Click around the app and

learn about its features.

You ca

Kassouf = ted advisor ۲.J \oplus [[\$8 Client View My Pay Bill Website Portal 401k <u>_</u> \square

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 mobilefriendly manner.

App Features

Document Scanner, Receipt Manager, Income Manager

〈 Back i	Documents	• 🗲 🗕	
Q Tap here to sear	ch	▼ 2	A p

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

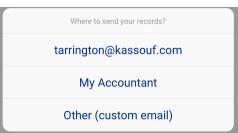
No Records Found

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.

🗸 Back	Create Document	$\Diamond \equiv$
Document Name e.g. Expenses.		
Date Select date		Ē



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. 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.



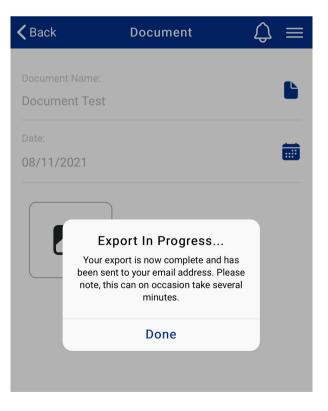
App Features Document Scanner, Receipt Manager, Income Manager

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

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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

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