

Client Portal

Instructions for Mac OS

By default, your Mac OS has a pdf “Preview” utility installed. This utility is sufficient to preview your return, but it does not support the enhanced functionality of viewing the action and invoice files that are attached to your return.

To experience full pdf functionality, we recommend that you download and install the FREE Adobe Acrobat Reader for Mac OS.

Steps to take:

1. Go to <http://get.adobe.com/reader/>
2. Click “Download now” button
3. Install the downloaded file in your Applications folder
4. Using Finder, search your system for a pdf file and select it (no need to open)
5. Do “Get Info” from the File menu, or hit Command-I
6. In the resulting Get Info window, open the “Open With” triangle, and select the Adobe Acrobat Reader program from the list
7. Click “Change All” button if you'd like this change to be system-wide

Your pdf files will not be opened by default using the fully functional Adobe Acrobat Reader. When you open your document, you will now see in the left pane of the viewing window any files that we have attached to your tax return.