

Web Portal Access Instructions

You may access your web portal by following the simple instructions below.

1. Go to the New Genesis Financial, LLC website at www.newgenesisfinancial.com and click on Client Login in the left hand side or <https://secure.netlinksolution.com/nextgen/#/home/dashboard>.
2. Enter your login Id and password. Your login id **is your email address**. If you have changed your password enter the new password in the space provided. If you have forgotten your password see the password recovery instructions below.
3. You will notice that on your main page there is a Document Presentation section as well as a File Exchange area. This is primarily how we will be submitting files to one another because the portal is more secure than email. The **File Exchange** area allows you to upload files to our office in a more secure method than email. The **Document Presentation** area is where you will find your financial reports, tax returns and other pertinent information. Items in this area can only be viewed and downloaded. When there is any activity in either section, you will receive an email notification that new items have been uploaded. I highly recommend that you add the following email addresses to your approved email list to ensure that you receive the alerts:
Document_Presentation@netlinksolution.com and File_Exchange@netlinksolution.com.

NOTE: Your Document Presentation folder may not be immediately visible if documents have not yet been posted to your portal.

Password Recovery

You can easily recover your own password through the portal itself. In the www.netlinksolution.com login page, click the "**Help! I've forgotten my password**" link to have the password emailed to you. Note: The password will be instantly sent to the email address used under My Account section of your web portal. The email will be sent from the following email address, support@netlinksolution.com.

If you are having problems receiving the email with the temporary password, there is a chance is that your email has blocked the incoming email so you will need to check your spam filter for it. In some instances the email address stored under My Account section of your portal is not valid. In this case you will have to contact our office to have your portal reset.

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Should you have any questions, please feel free to contact this office at 321-765-8200.

