



Terry Lockie & Associates, PC  
Portal Creation Information

Please fill in the following information and return the completed form in the enclosed envelope.

**Portal Admin** (required)

The Portal Admin is the person who will be the primary user of your portal. This user will have all rights within the portal and have the administrative ability to create and manage other Portal Users if that is necessary. You must have a Portal Admin so please complete the section below.

<b>First Name</b>	<b>Last Name</b>	<b>Email Address</b>
_____	_____	_____

**Portal Users** (optional)

Terry Lockie and Associates, PC can create any additional Portal Users you might need during the initial setup process. Keep in mind that creating additional Portal Users is optional and that anyone who has access to your portal will be able to see any of the files that exist there.

<b>First Name</b>	<b>Last Name</b>	<b>Email Address</b>
_____	_____	_____

<b>First Name</b>	<b>Last Name</b>	<b>Email Address</b>
_____	_____	_____

<b>First Name</b>	<b>Last Name</b>	<b>Email Address</b>
_____	_____	_____