

1. My Profile scrolls to display a summary of your personal information, contact information, profile details, and membership details.

Current profile information will migrate to the ProVisors Hub except for credit card information and passwords.



Personal Snapshot

[My Profile](#) [Member Directory](#) [Upcoming Events](#) [Needs/Deals/Wants](#) [Log Out](#)

[My Profile](#)

[Edit My Profile](#)

[My Groups](#)

[My Orders](#)

[My Payment Methods](#)

[My Registrations](#)

[Security & Login](#)



Alex Rose

Partner

Personal

Summary of your personal contact information.

Member Since	3/20/2019
Title	Partner
Profession	Accountant
Certifications	CPA
Company	Rose & Rose
Specialty	Taxation, Business Management

Short Bio

Extensive experience in the areas of transaction planning and business succession planning for privately held business and family estates. Holds a Masters Degree in Taxation and received training at Price Waterhouse with a focus on high-tech startups.

Contact Information

Account Phone	(415) 999-3333
Mobile	(415) 777-2222
Email	arose@provisors.com
Mailing Address for Reports	1212 Boogie Ave Burlingame, CA 91105 United States
Company URL	http://www.rosrose.com
LinkedIn Account	

Call Me When

Your client needs assistance with succession planning for their privately held

2. To add or change profile details click on the Edit My Profile button.



My Profile

[My Profile](#) [Member Directory](#) [Upcoming Events](#) [Needs/Deals/Wants](#) [Log Out](#)

My Profile

Edit My Profile 

My Groups

My Orders

My Payment Methods

My Registrations

Security & Login

You must complete fields ending with *.



Alex Rose

Partner

Name and Title

First Name

Last Name *

Suffix

Certifications

Title

Phone and Email

Call Me When

Account Phone

Mobile

Save

3. Edit or add details as desired.

Edit My Demographics

Number of Years in the Industry	<input type="text" value="15"/>
Company	<input type="text" value="Rose & Rose"/>
Company URL	<input type="text" value="www.rosrose.com"/>
Profession	<input type="text" value="Accountant"/>
Specialty	<input type="text" value="Taxation, Business Management"/>
LinkedIn Account	<input type="text"/>
Short Bio	<input type="text" value="Extensive experience in the areas of transaction p"/>
Full Bio	<input type="text" value="Alex Rose is a CPA and a member of the California Society of Certified Public Accountants and the American Institute of"/>
Clients	<input type="text" value="Small businesses and professional firms including medical and legal firms, construction, real estate, business and technical consulting."/>
Speaking Engagements	<input type="text" value="Conducted workshops for US Small Business Administration on fundamentals of bookkeeping and taxation for small"/>
Colleges	<input type="text" value="BS, Accounting Indiana University, Bloomington"/>
Graduate Institution	<input type="text" value="Masters of Taxation, San Jose State University, M"/>
Social Clubs	<input type="text" value="San Francisco AYSO"/>
Organizations	<input type="text" value="Rotary Club of San Francisco"/>

 New Short Bio section

The 'Short Bio' is a concise snapshot of your professional focus and will be used for continuity in the following places: (250 character limit)

- Displayed as a featured field in a Member's Profile Detail page.
- Featured Bio in Photolist.
- Searchable as a Keyword search in the Directory.

4. After you are done editing your profile details be sure to scroll all the way to the bottom and click on the Save button.

Charities

Ronald McDonald House Charities

Billing Address

Billing Country Code: United States

Billing Street: 1212 Boogie Ave

Billing City: Burlingame

Billing State/Province Code: California

Billing Zip/Postal Code: 91105

Mailing Address

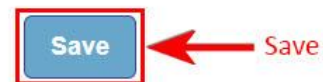
Mailing Country Code: United States


Mailing Street: 1212 Boogie Ave

Mailing City: Burlingame

Mailing State/Province Code: California

Mailing Zip/Postal Code: 91105



5. To upload a new photo click on your current profile picture. If there is no profile photo already there, click on the  button to upload a photo (see next page).



Click here to change profile photo

Personal Snapshot

[My Profile](#) [Member Directory](#) [Upcoming Events](#) [Needs/Deals/Wants](#) [Log Out](#)

[My Profile](#)

[Edit My Profile](#)

[My Groups](#)

[My Orders](#)

[My Payment Methods](#)

[My Registrations](#)

[Security & Login](#)



Alex Rose
Partner

Personal

Summary of your personal contact information.

Member Since	3/20/2019
Title	Partner
Profession	Accountant
Certifications	CPA
Company	Rose & Rose
Specialty	Taxation, Business Management

Short Bio

Extensive experience in the areas of transaction planning and business succession planning for privately held business and family estates. Holds a Masters Degree in Taxation and received training at Price Waterhouse with a focus on high-tech startups.

Contact Information

Account Phone	(415) 999-3333
Mobile	(415) 777-2222
Email	arose@provisors.com
Mailing Address for Reports	1212 Boogie Ave Burlingame, CA 91105 United States
Company URL	http://www.rosrose.com
LinkedIn Account	

Call Me When

Your client needs assistance with succession planning for their privately held

- To change your photo drag and drop your photo file into the blue box or click on it to choose a photo from your files. The ideal photo size is 200px by 200px and the file size limit is 2mb.

The screenshot shows the ProVisors user interface. On the left is a navigation menu with items: My Profile, Edit My Profile, My Groups, My Orders, My Payment Methods, My Registrations, and Security & Login. The main content area is titled 'Personal Snapshot' and includes links for 'Needs/Deals/Wants' and 'Log Out'. A modal window is open in the center, titled 'Current Photo:'. It displays a current profile photo of a woman with a close icon in the top right corner. Below the photo is a large blue dashed box containing the text: 'Drop a photo here, or press to manually choose one. File size limit is 2mb.' A 'Cancel' button is located at the bottom right of the modal.

ProVisors

Personal Snapshot

Needs/Deals/Wants Log Out

Current Photo:

Drop a photo here, or press to manually choose one.
File size limit is 2mb.

Cancel

Masters Degree in Taxation and received training at Price Waterhouse with a focus on high-tech startups.

Contact Information

Account Phone	(415) 999-3333
Mobile	(415) 777-2222
Email	arose@provisors.com
Mailing Address for Reports	1212 Boogie Ave Burlingame, CA 94105 United States

7. For security reasons, Passwords will NOT migrate to the ProVisors Hub and all Members will need to create a new Password. You can create a new Password in one of the following ways:

1. You will receive an email with a link that is personalized to you. Follow the link and set up your new Password.

Hi Alex,

Your password has been reset for Community Hub. To create a new password, go to: <https://staging-jumpstart-1658b819427.cs4.force.com/communityhub>

Thanks,

ProVisors
15165 Ventura Blvd Suite 425
Sherman Oaks, CA
USA
Tel: (888) 684-4447
Fax: (818) 382-6492

2. Log in to hub.provisors.com and click on the [Forgot your Password](#) link on the page.



Welcome

[Log In](#)

ProVisors Hub Login

Welcome to the NEW ProVisors Hub. If this is your first time logging in, you must change your password. Click the "Forgot your Password?" link below and follow the directions to set your new password

Log In

Email

Password

[Forgot your password?](#)



[Forgot your password?](#)

8. For security reasons, Credit Cards will NOT migrate to the ProVisors Hub and all Members will need to enter Credit Card information by clicking on the My Payment Methods tab and clicking on the Add Credit Card button. Or, credit card information can be added individually for each Payment.



My Payment Methods

[My Profile](#) [Member Directory](#) [Upcoming Events](#) [Needs/Deals/Wants](#) [Log Out](#)

[My Profile](#)

[Edit My Profile](#)

[My Groups](#)

[My Orders](#)

[My Payment Methods](#)

[My Registrations](#)

[Security & Login](#)

[Add Credit Card](#)

[Add Credit Card](#)

We don't see any saved payment methods for you. Save a payment method today, so you can checkout even quicker.

9. Enter your Billing Address and your Credit Card information.
Click the Save button.



Manage Credit Card

[My Profile](#) [Member Directory](#) [Upcoming Events](#) [Needs/Deals/Wants](#) [Log Out](#)

[My Profile](#)

[Edit My Profile](#)

[My Groups](#)

[My Orders](#)

[My Payment Methods](#)

[My Registrations](#)

[Security & Login](#)

Payment Method Information

All fields are required.

Default

Billing Street

Billing City

Billing State

Billing Postal Code

Billing Country

Credit or Debit Card

Name on Card *

Card Number *



Security Code *

Expiration Date *

Save



Save