

CLIENT STEPS FOR TAX PREPARATION

Your Taxes, Your Schedule! We work primarily through digital and electronic format. This allows you and us the flexibility and freedom to work at our own convenience as well as not having to coordinate meeting times and places that in turn helps keep our prices low for you. Want to do your taxes late in the evening or early in the morning? No problem for us as we all get to work at times of the day and night that meet our individual schedules! If for some reason, you would rather have an in-person meeting, we will strive to accommodate that request.

1. **Gather all of your tax documents** provided to you by others (W-2's, 1099's, student loan, mortgage interest, 1095 (Health Care), investment account information, Unemployment info, etc.)
2. **Fill out OUR Organizer.** Your preparer may have provided you with their Organizer forms or with their website with their Organizer forms. If you need Organizer forms, you can find them at <http://taxpretoolbox.com/>

Not filling out our Organizer will cause delays and add fees to your invoice.

Everyone must fill out:

- a. **Organizer #1** - Primary
 - b. **Organizer #2** - Intake Questions
 - i. Where you answer YES to any question, refer to the far right ACTION column for further instructions.
 1. When the ACTION refers you to ORGANIZER [name], retrieve that worksheet from the website
 - c. **Organizer #3** - Letter of Engagement
3. **Scan your Organizer worksheets** into your computer* *as PDF documents*
NOTE: PDF ONLY; no other file format
 4. **Scan ALL of your tax documents** into your computer* *as PDF documents*
NOTE: PDF ONLY; no other file format
 - a. Do **NOT** send us receipts or other material for which we have not asked
 - b. Scan in **ALL** copies of **ALL documents** (W-2's, 1099's, etc.)
NOTE: Especially scan **ALL pages of ALL W-2's** and ALL pages of your investment information
 5. **Upload all of your documents** into our encrypted secure file transfer portal TransferPro <https://transferpro.securefilepro.com/portal/default.aspx>
 - a. Upload **ALL** of your documents *at the same time*; do not upload **ANY** documents until you can upload **ALL** of your documents
 - b. You can use Guest File Transfer for which you do not need any setup nor password
 - c. If you want to have a dedicated folder, we will gladly set one up for you at no charge. After we have set up your folder, you will receive an email directing you how to complete the setup process. You will then always need to use your folder with a username and password. To set up your folder, send us an email and provide us with your
 - i. Full name - as it appears on your Social Security Card
 - ii. Last four digits (only the last four) of your Social Security number

If for some reason you are unable to work with the TransferPro, please contact us so we can consider other arrangements for getting your materials to us.

* If you do not have a scanner and you want to use an app on your smartphone or tablet, please ensure you are using the PDF file format, only. Also, please check your scans after you have made them, to ensure they are readable.