

## How to scan documents for uploading to your secure portal

We are pleased that so many clients are using our secure portal to upload documents. We would just ask that you help make the process a little more efficient for us. If you are using a cell phone, please get an app that supports PDF files.

Whether you are using a desktop scanner or a cell phone, please combine documents and pages as much as possible. Do not submit 30 or 40 separate pages that might be combined into perhaps a couple documents.

For example, if you have a 12-page brokerage statement, combine all 12 pages into just one document, rather than sending us 12 separate pages. Also, we prefer that the documents be saved as a PDF, not as JPEGs, if possible.

You may combine similar documents into one PDF. Here's a list of documents that can be combined:

1. W2s
2. 1099-R for retirement distributions
3. Social security statements
4. Both 1099-Dividends and 1099-Interest can be combined into one document
5. 1099-MISC and 1099-NECs
6. Mortgage interest statements (but scan interest statements for rental properties into a separate file)
7. Property taxes
8. 1098-T tuition statements

However, if you have more than one brokerage statement, do not combine them.

With the exception of brokerage statements, you do not have to scan the boilerplate back page of documents like W2s, 1099s, etc.

If you are submitting documents for someone else in the family who will have a separate tax return, do not combine those documents with yours. You might label them something like W2s Joey.

If you and a spouse, if applicable, both have a Schedule C business, or you have more than one business, do not combine the 1099-MISC/NECs. Label each file appropriately.

For your personal return, in most cases you do not need to scan in:

1. Bank statements
2. Receipts from doctors and pharmacies. Just make a summary. For example: prescriptions, \$2,451. But if you are not sure something is deductible, scan it.

Remember that we need copies of letters of acknowledgement for your charitable donations if the donation(s) to any one charity is \$250 or more.

If you have questions, just ask!

Thanks,

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