From: _____

Sending your documents: a few tips

We'll send you a secure link with a list of the documents we need. Open it on your phone or computer. You don't need an account or a password. If you sign in to our client portal, you'll find the same list on your Documents page.

1. Scan paperwork to a PDF

For long paperwork, scan it to a PDF with your phone. Most phones have a scanner built in:

- **iPhone or iPad:** in the Notes or Files app, look for **Scan Documents**.
- **Android:** look for a **Scan** option in your camera or files app.

A PDF, Word or Excel file is sent just as it is, up to **100 MB** each.

2. Put each file on its item

Each document on the list has its own spot. Add a file to the item it belongs to, then tap the **Send** button on that item.

If one item needs several files, such as three monthly statements, add them all to that same item.

3. Or take a photo of each page

On your phone, you can take the photos right from the item. Several photos on one item become one PDF, in the order you add them: up to 30 photos, each up to 25 MB.

If a photo can't be sent, the page says which one and why; the others still go.

4. No need to rename files

Whatever you send reaches us with the item you sent it to, so put it on the right item and we'll know what it is.

5. Already sent something?

You can still send more. Tap **Add more files** on that item. The new files reach us with that item, and what you already sent stays as it is.

What you can send

PDFs, photos, Word and Excel files, CSV and plain text files. Send the files themselves, not a .zip. For accounting software files, export the report you need as a PDF or Excel file and send that.

Questions? Contact us

Name _____

Phone _____ Email _____