Organizing and Delivering Your Tax Return Preparation Documents

As the world becomes more computer and electronic centered, we are looking for ways to ease your tax preparation burden. Many of these suggestions can be applied to both electronic and paper documents. They can also apply to your 2012 and beyond tax preparation.

The first thing to do is to set up a place to store your tax documents. For paper files, a file folder in a convenient place will do and, for electronic documents, a file folder on your computer will also do. You may wish to further sub-divide these folders into sub-folders for such items as income, itemized deductions, education, investment, medical, etc. Whatever fits your needs will work.

As you receive your documents, either at the end of the year or throughout the year, place those documents in the appropriate folder. If you receive documents electronically or can retrieve your documents electronically, just store a copy in the appropriate tax folder at the same time you store it for your own personal purposes.

When tax time arrives, all you have to do is get the folder to us and we have all of your backup documents needed to prepare your tax returns.

If you have a NetClient CS Portal through us, and your files are in electronic form, log onto your portal, select “File Exchange” from the left side of the screen, click on the folder whose name includes “doc exchange” in the name, click on the “Upload” icon along the top of the screen, and select “Add Files”. A popup window will open. There will be a drop down window at the top labeled “Look in”. You can browse your computer to the folder where you saved your tax documents. Select all of the documents you want to upload at one time by highlighting them. When you have done this, click “Open”. This will return you to the “Upload” window. At the bottom of that window click “Start upload”. When the upload has finished, you just log out. We will automatically be notified that the files are available for us to download into our system. This is all done in a secure fashion similar to how you electronically deal with your bank or stock broker. If you would like to try it and feel unsure of the procedure, we will be happy to walk you through it.

Within your electronic folder, also make a folder labeled “Uploaded”. After you have uploaded a document to us, move it into the “Uploaded” folder so you can keep track of what you have already sent to us. It will save you both time and confusion.

For paper documents, you have several choices. You can mail them or bring them to us. We will scan them into our system and return them to you when we complete your tax returns. If you choose to receive your tax return copies via our NetClient CS Portal or on a CD, we will include copies of the documents we used to prepare your returns on those media.

If you have paper documents and wish to electronically send them to us, you will need to scan them onto your computer. Once you have done this, just follow the procedures outlined above to upload documents. You may also use this method to send us your completed 2012 Client Organizer and 2012 Client Organizer Questionnaire. You may also e-mail tax documents to us as attachments, but the method is not secure and we do not recommend that you use it. It is safer, though still not recommended, if you encrypt any documents you attach to an e-mail. If you do this, you would then need to send to us the password in a separate e-mail for security purposes.

As always, feel free to contact us if you have any questions or issues with getting your tax documents to us.