

## **HOW TO SEND US DOCUMENTS:**

### **UPLOAD THROUGH YOUR CLIENT PORTAL:**

You can send us additional documents (such as copies of your W2s) through your portal in two ways:

- 1) You can attach up to 50 files to your web-based **Tax Organizer** prior to clicking "Send to Preparer". The maximum size for each file is 10 MB.

This option is only available once and shuts off after you've sent the completed Web Tax Organizer to us.

- 2) You can always upload documents to us using the "**File Exchange**" feature in your portal. The maximum size for each file is 2 GB.

This option is located on the left-side of your portal and is **always available**.

Both are convenient and secure ways to send information regarding the preparation of your tax return without having to mail or deliver these documents to our office.

We receive an email notification when you send your Web Tax Organizer to us and every time you upload any documents using the File Exchange.

### **FILE FORMATS YOU CAN UPLOAD:**

You can upload the following types of files to your Tax Organizer or through File Exchange:

- Quicken® tax exchange format (.txf),
- Microsoft® Excel® (.xls, .xlsx),
- Microsoft® Word® (.doc, .docx, rtf),
- Adobe® Reader® (.pdf), text documents (.txt), and
- image files (.jpg, .bmp, .tif, .png).

Please **DO NOT** upload Apple, MAC or .numbers files.

### **MAIL OR FAX:**

You can mail us your tax organizer and/or documents to:

- Schwartz & Schwartz, CPAs  
8 Cedar Street  
Suite 54  
Woburn, MA 01801

You can fax us at: (781) 938-0185.