



Certified Public Accountants

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TIPS FOR SUBMITTING INFORMATION

- For security reasons, we strongly encourage the use of our encrypted **portal**, and you will receive an email with a link for registering. It's easy and secure - see the Quick Start Guide.
- Please do NOT email documents containing sensitive information, as this is *not* secure.
- Time is money in our world, so please submit your information **all at one time**, if possible. It is inefficient for us to re-start your return each time a document is received.
- **Double-check** your books and/or financials before you send them in. It takes extra time to make revisions when you send us new figures or a changed QuickBooks file.
- Please use the **Organizer** we send out in January. It is designed to assist you in gathering the information we need to efficiently and accurately prepare your tax returns, as well as potentially uncover additional deductions, etc. At minimum, completing both the **Questionnaire** and **Engagement Letter** are required.
- We rely on the numbers and information that you provide, but we will **follow up** with you for clarification or to ask for missing documentation.
- Please send us **only what is required** or requested, and insure you are not sending duplicate information. It takes extra time for us to sort out unnecessary documents.
- Attach documents to your Organizer or use the **File Exchange** feature to upload them to the portal. You can upload multiple files at one time if they are from the same location on your computer. We will be notified when you have done so.
- Combine your documents into **one PDF** if possible instead of multiple, separate ones. We can organize the pages as needed.
- Please do not send photos of documents taken with your **phone**, as they are not in a usable format. Scan and upload to the portal using File Exchange or attach to your Organizer.
- The sooner, the better! Ideally, we'd like to have your documents to us *60 days* in advance of a filing deadline. You will find our published **Office Deadlines** on our website (under the Tools Tab), and we cannot guarantee timely filing when information is provided to us after the suggested dates.
- Go to our **website** to log in to the portal and get instructions, tax tips, guides, forms, news and lots more information!

www.bouldercpas.com