



Certified Public Accountants

1790 30th Street, Suite 418, Boulder, CO 80301 | P 303.449.3060 | F 303.449.2747 | bouldercpas.com

TIPS FOR SUBMITTING INFORMATION

- For security reasons, we strongly encourage the use of our encrypted **portal**. Ask your tax manager about registering for your own secure client portal.
- If you prefer to email your documents, please send them **password-protected**.
- 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.
- Attach documents to your Organizer or use the **File Exchange** feature to upload them to the portal. We will be notified when you have done so.
- You can upload multiple documents **at one time** to the portal through File Exchange.
- Combine your documents into **one PDF** if possible instead of multiple, separate ones. We can organize the pages as needed.
- 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.
- 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! Please try to have your documents to us *60 days* in advance of a filing deadline. Our **Office Deadlines** are published 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