

SafeSend Organizers Tips & FAQ

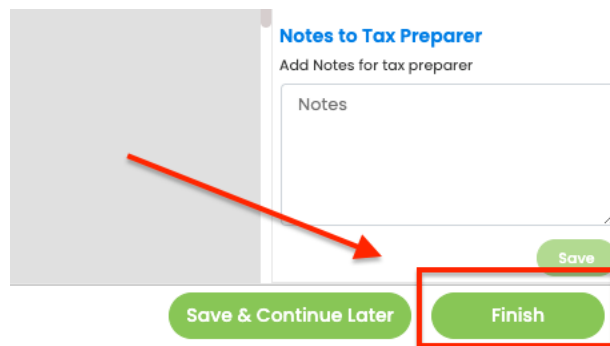
At Capital Accounting & Tax, we transitioned to SafeSend- Organizers to help streamline our process by providing our clients with a digital organizer and a place to provide their source documents securely. SafeSend Organizers has an easy-to-use interface and ensures client security.

Why Digital Organizers?

- Increased security around the sharing of your confidential tax documents.
- An improved turnaround time in preparation of your tax return — we will no longer have the delay of information being routed through the mail, and we will have immediate access to documents.
- Simultaneous access to the same tax documents — you will retain a copy of all information you provide to us through the software, which means you will not have to wait for us to process and return any documents to you that you may need as we complete your tax return.
- While the organizer is a fillable PDF you can type into, you are not required to fill out the entire organizer, instead it is provided to you as a helpful tool. We provide our clients with a digital organizer as a tool to help remind clients of the documents that your tax manager will need to complete your tax return.

Helpful Tips

Once you are ready for our team to review your documents and start your return, please be sure you mark your organizer “Finished”. By selecting the GREEN “FINISH” button, you are letting us know you have finished the organizer step. You can continue to upload documents, even after you have marked the Organizer, “Finished.”



We will download your organizer and the documents to date, and we can start working on your return. We normally will not download your organizer and documents until we are certain you are finished, so it is very important to follow these steps.

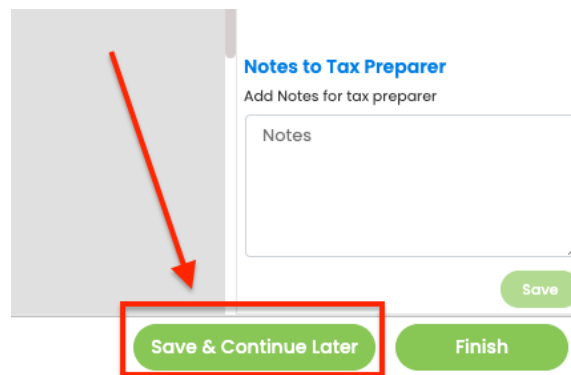
SafeSend Organizers FAQ

I prefer to fill out a paper organizer, how can I print a copy?

After you open the SafeSend organizer, click “complete organizer”, then click the download icon in the top right to print your organizer. You can also send an email to admininfo@yourwealthtax.com if you have any questions.

Can I start the organizer and come back to it later?

Yes! To save your work, click the green “Continue Later” button in the bottom right corner.

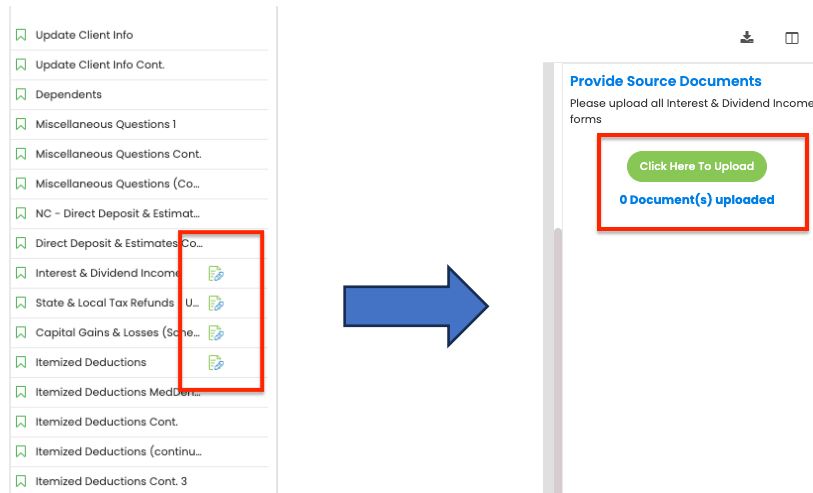


Can I access the organizer at the same time as my spouse?

While the program allows both taxpayer and spouse to access the organizer simultaneously, we do not recommend it. **If both parties make changes, it will only retain what the last person saves.**

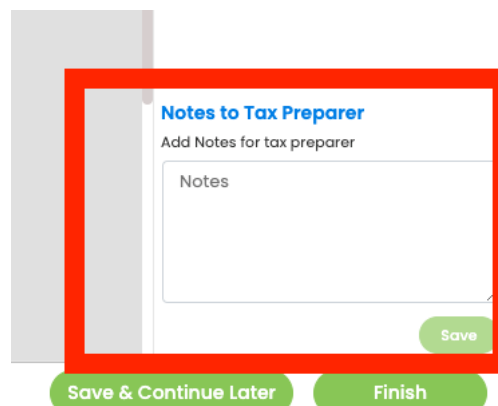
What does the paper clip icon mean?

Certain pages of the Organizer will show a paper clip icon. These pages will allow you to directly upload Source Documents that correspond with that page. So if you're on the interest/dividend page you can attach those docs right there, or the rental page, etc. If that's too much just attached your documents at the end all at once.



I had a major life event (marriage, birth of child, sale of a home), where should I put this in the organizer?

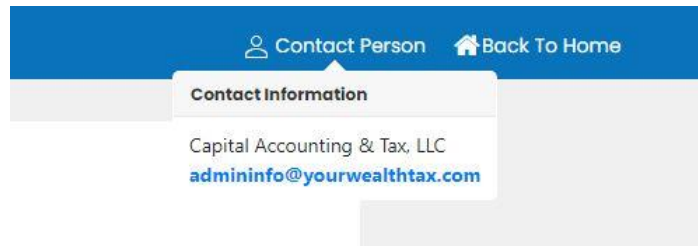
This information will usually be addressed in the “Custom Questionnaire” at the beginning of the organizer. If for any reason your specific event was not addressed in the questionnaire, please use the “Notes to Tax Preparer” box in the bottom right corner to notify us about big changes or give additional information. All notes are compiled to a page at the end for your tax preparer to read.



If I type in the Notes section, will my question be seen immediately?

The notes section is NOT a chat feature but a limited area to provide a quick note to the CPA for the current page you are on. It will be read once we begin preparing your tax return.

If you have an immediate question, please hover over “Contact Person” on the top right of your organizer to get answers for immediate questions. You can also send an email to admininfo@yourwealthtax.com



What type of files can I attach?

We prefer PDF files of your tax documents, but can also accept JPEG, Word, and Excel files. If you attach a JPEG photo image, make sure it is legible.

Where can I attach files that don't have an organizer page? Can I upload tax documents after I have finished my organizer?

After you have completed all relevant sections of the organizer, click the green "finish" button in the bottom right corner. You will be taken to the home screen where you can click "upload documents" to attach any additional files.



I finished uploading source documents, what is the difference between "Complete Later" and "Finish"?

When you have completed the organizer and uploaded your source documents, you will be given two options. Select "Finish" if you are confident that you have submitted all your tax documents and are ready for us to prepare your return. *"Finish" will lock your organizer and you will not be able to make changes or add more files. If you do need to upload any more files, please send an email to admininfo@yourwealthtax.com and we will send you a direct link to upload any additional documents you receive.*

What Internet Browser should I use?

For the best experience, we recommend using Google Chrome. It will also work with Safari, Firefox, as well as other browsers, but we strongly discourage using Internet Explorer while using SafeSend. SafeSend does not work well with Internet Explorer.

Can I use a mobile device or iPad?

Yes! You can use your phone to upload documents. This will also allow you to take pictures of documents with your phone or iPad to upload documents securely.

I don't have a scanner. What should I do?

You can use the camera on your phone or iPad to take pictures of documents and then upload them. Please be sure the documents are adequately lit and on a flat contrasting surface for best results.

I completed uploading documents but have additional files to send, what should I do?

Contact us at admininfo@yourwealthtax.com and we will send you a secure email to continue uploading documents.

If you have any questions, please do not hesitate to reach out to your primary contact at Capital Accounting & Tax, LLC. or contact our Client Success Team by e-mailing admininfo@yourwealthtax.com or calling 404-531-0018.

Again, the goal is simple, easy, secure and complete. We hope these upgrades make working with us all of these things.