



Schuman, Simon, & Grodecki, Ltd.

SS+G Ltd Collaboration, Technology & Security Update

SS+G Ltd is using software technologies to help clients increase efficiency, stay connected and informed while maintaining security and social distancing recommendations. Every client has the capability to utilize the below technologies to adhere to recommended safety and security measures. As we remain distanced, electronic documents, signatures and transfers are becoming more popular. By utilizing SS+G Ltd implemented technologies we can all remain safe and secure. With cyber-crime at an all-time high, the unreliability of U.S. mail, and reduced person-person contact due to Covid-19 we encourage clients to use these technologies. All these technologies can be used on all platforms or individually on a web browser, desktop app, cell phone app.

Please email jmg@ssgltld.com for more information on any of the below integrations or to be added.

Adobe PDF's – (PDF copies all available in our shared Dropbox)

Formed PDF (able to type in boxes), Electronic Signatures, Searchable PDF, Password Protection

Allows clients to view all their files, go paperless, sign documents, and type in PDFs.



Tax Organizers

E-file Authorizations

Tax Returns

Tax Information

Fill out your tax organizer digitally. You are able to type in boxes.

Able to sign digitally. (Most clients print, sign and re-upload)

Past 7 years of tax returns all digitally located in Dropbox.

SS+G Ltd makes all documents searchable by keyword.

Constant Contact - Email Marketing



SS+Gs Ltd keeps Clients up to date with News and Alerts Via Email.

Due Dates, Planning, Reminders, Tax Matters, Updates

Dropbox - Secure Encrypted File Transfers and Paperless Document Options



SS+G Ltd continues to use [Dropbox](#), a cloud portal, where files (PDF, Images, Word, Excel, Quickbooks, etc.) such as tax information & returns can be stored, downloaded or uploaded.

SS+G Ltd encourages clients to use Dropbox (opposed to email) to securely store documents as electronic documents become more popular. Additionally, Dropbox can relieve the concerns of the unreliability of U.S. mail and reduce person-person contact due to Covid-19.

Dropbox allows permanent secure encrypted storage to view/download/upload between SS+G and clients. There are easy ways (click on a link) to access/send your files with and without having a Dropbox account.

Whether you feel comfortable going completely paperless or want both paper copies and electronic copies, SS+G is making it easy for you to have secure access to all your files. See attached sheet for more details.

HelloSign – Electronic Signatures - NO SIGN UP OR ACCOUNT NEEDED!



Sign your tax documents quickly and easily with legally binding signatures.

Draw, Type or Upload a photo of your signature to sign a document!

This can be done on a computer, smartphone or tablet.

Zelle – Electronic Payments



Based on the growing use and popularity of electronic payments, SS+G Ltd is now accepting electronic payment processing from [Zelle](#). All major U.S. banks have in-app integrations with Zelle with NO additional registration required other than to “opt in”. SS+G Ltd Recipient ID for Zelle Payment jmg@ssgltld.com "JMG@SSGLTD(dot)COM"

Zoom – Electronic Conferencing



[Zoom](#) is a web-based video conferencing tool with a local, desktop client and a mobile app that allows users to meet online, with or without video.

Face to Face conferences are possible using your cell phone, laptop or webcam.

Please contact your SS+G representative to setup a meeting.