



DROPBOX TO SEND & RECEIVE SECURE ENCRYPED FILES!

Clients use Dropbox to go paperless while keeping confidential information secure.

[SS+G introduces Dropbox](#), a client portal, where files (PDF, Images, Word, Excel, etc.) such as tax information & returns can transferred and saved for permanent seam-less delivery. Over 700 million registered users around the world rely on Dropbox for encrypted secure file storage.

NOTE – Cybersecurity professionals recommend to NEVER send files via unsecure email (this includes password protected PDF) as this is NOT considered a secure method. If you are concerned about the wellbeing and security of your personal information, please use one of our secure electronic options provided.

Simply create a free Dropbox account (up to 2 gigabytes storage is free and you choose your password) and notify SS+G that you would like to participate and we will create a shared folder that can display your past tax returns, tax information or any other files you might need. This is a “2-way system” so you will be able to send us files encrypted as well by placing files in your Dropbox. Clients may choose this as a safe electronic alternative to paper returns or emailing sensitive files while having access to their files at all times.

If you would like a personal Dropbox setup for your prior and/or future tax files, email Jon Grodecki at jmg@ssglttd.com. Create a free Dropbox account and notify us of your email address associated with your account. SSG will then invite you to our shared Dropbox where we both have access to the folders contents.

At your discretion, we are able to add other individuals’ access to the box or share a link to a single file(s). A fantastic way to share your tax returns or distribute K-1's electronically with family member(s) or financial representative.

SECURE OPTION TO ACCESS FILES

[Access Dropbox via SSG Email Link](#) – SSG can send you an encrypted Dropbox link to your Dropbox. You DO NOT need a Dropbox account to access the links and view/download your files. Simply click on the link and you can view/download the PDF's. The link will be password protected (last 4 of your social, unless the client states otherwise)

SECURELY UPLOADING FILES via Dropbox

1. [Dropbox Client Upload via SSG provided web browser link \(preferred method\)](#) – With Dropbox upload requests you DO NOT need a Dropbox account to upload your files! Email Jon Grodecki at jmg@ssglttd.com and we will send you an upload link. Simply click on the link and drag any files onto the web browser screen and SSG will receive the files secure and encrypted! Both the uploader and SSG receive a confirmation email upon a successful upload.
2. [Dropbox Client Upload directly into Shared Dropbox](#) – Clients can upload files directly to our shared Dropbox. In our shareable folder, we ask clients to please upload files into corresponding tax year or Upload Folder. Once you are a completed uploading all or most documents, please notify your SSG representative of your uploads.
3. [Dropbox Client Upload via SSG email signature line](#) – Every SSG employee has a link located in email signature line to securely send files. Both the uploader and SSG receive a confirmation email upon a successful upload.

Resources for Further Dropbox Instruction & Tutorials

[Dropbox Mobile App](#) – (Recommended) **DROPBOX ACCOUNT REQUIRED** <https://www.dropbox.com/mobile>

Excellent for users who want document viewing/management access to Dropbox files on phone or tablet.

Able to view, forward, download, scan, create and share files in the Dropbox Mobile App. ([video tutorial to scan](#))

Easy to create, scan, or upload photo docs using your phone camera which go directly to our shared Dropbox.

[Dropbox Scan App](#) – Free Non-Paid **DROPBOX ACCOUNT REQUIRED** <https://www.dropbox.com/doc-scanner-app>

Turn your phone into a document scanner! Scan Paper Docs Directly into Dropbox ([video](#))

[Dropbox Computer Desktop App](#) – **DROPBOX ACCOUNT REQUIRED**

Allows a user to use Dropbox as if you were using your computer windows file explorer. (Do not use on public computer)

View, add, edit, sign or delete any file in our shared Dropbox folder as you normally would use a computer.

When using this app, Dropbox files will sync to your computer in real time unless you disable the smart sync feature.

[Dropbox Tutorials](#)

<https://help.dropbox.com/learn>

Self Learning Tutorials ([videos](#))