



CERTIFIED PUBLIC ACCOUNTANTS
ACCOUNTING | TAX | CONSULTING

2021 Tax Organizers Ready!

Client Action Items for Tax Preparation

January 10, 2022

Hello,

2021 Tax Year Organizer is now available in digital format. If you received a paper copy in the past and are NOT interested in electronic options, you can ignore this email. Paper organizers will be mailed late January.

Your individual tax organizer (NOT trusts or business returns) has been prepared for your use in gathering the information needed for us to prepare your 2021 personal tax return. Selected information from your prior year tax return has been entered in this organizer.

The quality of your tax return, the timeliness of its preparation, and our cost for services depend strongly on obtaining all your tax documents and information in an efficient manner. As more companies move to electronic delivery of their tax documents and statements, tax organizers and [SSG Tax Document Checklist](#) help ensure you are not missing important tax documentation.

NEW - eSign Engagement Letter & Fill Organizer Questions



User friendly SSG engagement letter (mandatory signature) and tax organizer questions can be signed and filled using HelloSign eSignature technology!

[NO ACCOUNT CREATION IS REQUIRED! Click for more info](#)

NO NEED TO FORWARD ONCE COMPLETED HelloSign eliminates the need for the client to sign and forward an executed / fill copy. Both SSG and client will receive a PDF copy via email.

Signature Required

Click button below to eSign

As in the past, clients can also sign the mailed or Dropboxed copy via pen and paper. The IRS, American Institute of Certified Public Accountants (AICPA), ethical guidelines and our professional liability insurance require signed client engagement agreements.

2021 SSG Engagement Letter

Recommended

Click button below to Fill Tax Organizer Questions

Please fill out the below questions to the best of your knowledge as they might benefit your tax situation. To answer, click on each corresponding text box and place an X in the box mark the selection.

Notes can be made in textboxes.

2021 SSG Tax Questions

Tax Organizer Instructions

STEP 1 - If Applicable, Notify SS+G of any changes to mailing or email address

- Do you want the tax organizer sent to an alternative address other than main residence?
- Do you have an updated mailing address?
- Do you have an updated email address? (SSG recommends using a personal email for individual tax matters as others may have access to your work email)

STEP 2 - Choose a delivery preference of tax organizer

Delivery method is defaulted to your preference from prior year unless you state otherwise. Every client has the tax organizer available digitally in Dropbox. Just ask to be linked!

1. Dropbox clients can access tax organizer digitally via www.dropbox.com.

2. Paper clients will receive their tax organizer in the mail late January.
3. Hybrid clients (both paper and Dropbox) will receive both paper and digital copies.
4. Do NOT send tax organizer

STEP 3 - Client Completes the Engagement Letter, Questions & Tax Organizer

Please complete and return the engagement letter, questions & use the tax organizer as a guide to provide all of your source documents. Client DOES NOT need to manually copy source document information into the tax organizer (include copies of your W-2's, Form 1099's, Investments, Schedule K-1's, etc.)

POINTS OF EMPHASIS

- [Engagement Letter](#) HelloSign and date the authorization page. (MANDATORY) [PDF COPY](#)
- [Tax Organizer - QUESTIONS](#) via HelloSign - Answer the "Yes/No" in the front of the tax organizer. The questions are very important and can possibly save you money. [PDF COPY](#)
- [Drivers License Requirement](#) to e-file. If we do NOT have on file from prior year or you obtained a new license this year, we ask that the client provides a photo or enters driver's license or State ID information and number.

STEP 4 - Sending Source Documents to SS+G (use any combination of options)

Informational Letter - [Gathering & Sending SSG Your Tax Documents](#)

1. Mail paper documents to SS+G Office - Client Originals or Copies
2. Drop off paper documents at SS+G Office - Client Originals or Copies
3. Dropbox (Secure) - Notify SSG team member once you are completely done uploading.

Manually Upload Source Documents to Dropbox into Upload folder or 2021 year folder.

or

EASY UPLOADING LINK - SSG Preferred Method for Receiving Electronic Files

(Allows client to Drag and Drop files directly to our shared Dropbox Uploads Folder)

Upon a successful upload, both the uploader (yourself) and the recipient (SS+G) will receive a confirmation email and we received files secure & encrypted!

Dropbox Upload Link Not Available

Where do the files go? To our shared Dropbox folder where both the client and SSG have access -

File Path Example In Dropbox

Client First & Last Name (Shareable) < Upload Folder - Client First & Last Name

4. [SS+G Representative Direct Upload Link](#)(Secure)

Every SSG team member has their own secure upload link located on email signature line at bottom. A client is able to access these direct upload links from any email sent from a SS+G team member.

5. Email Files (Not Secure) – Please be advised sending any sensitive information via email (even password protected PDF) is NOT considered secure by the IRS and cybersecurity professionals. We recommend using a secure electronic option listed above to protect your sensitive information.

STEP 5 - Notify/Contact SS+G Team Member

Regardless of your method of returning your tax organizer and source documents, mailed paper, uploaded to Dropbox or a combination of both, please notify your SS+G team member once you are completed (or close to completed) via email or phone call to confirm we received your information.

If you wish, set up an appointment with your SS+G tax professional for a zoom meeting or phone call to review and discuss your tax situation.

Resources for Further Dropbox Instruction, Tools & Tutorials

[SSG Dropbox Client Letter](#)

[Dropbox Mobile App](#) – FREE 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. SS+G recommends setting up 2-step authorization and a separate passcode to enter app.

[Dropbox Scan Mobile App](https://www.dropbox.com/doc-scanner-app) – FREE 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](#) – FREE DROPBOX ACCOUNT REQUIRED

Allows a user to use Dropbox as if you were using your computer windows file explorer. Download app to computer, change preferences > file folders to "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 and the app is on, Dropbox files will sync to your computer in real time unless you disable the smart sync feature. SS+G can view/receives any file you place in our shareable folder. Amazing!

[Dropbox Tutorials](#)

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

[Self Learning Tutorials \(videos\)](#)

If you should have any questions, please contact your Schuman Simon and Grodecki representative.

Very truly yours,

Schuman Simon & Grodecki, Ltd.

