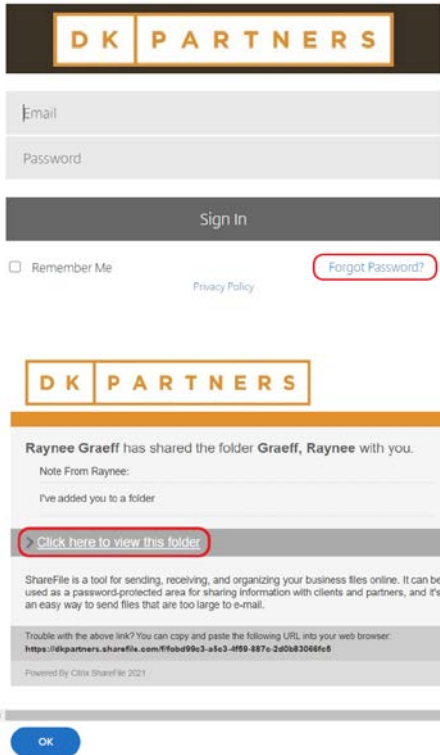


ShareFile Instructions

To protect you from outside cyber-security threats to personal financial information as well as prepare tax returns in the most efficient way possible, we utilize Citrix ShareFile to send and receive sensitive and confidential information.

We will be sending Tax Organizers through ShareFile for downloading/uploading. Instructions on how to complete the Tax Organizer using Adobe PDF (or another PDF viewing application) are shown below. If you have not received your organizer upload alert by February 3rd, please contact us at 512-258-6637.



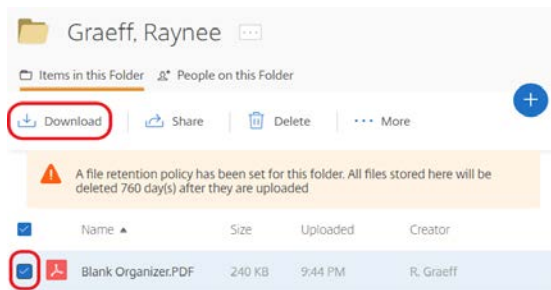
Existing Client – Forgot Password

Existing clients have been linked to a ShareFile folder. If you already have a ShareFile account, but cannot remember your password, navigate [here](#) and select “Forgot Password?”

You will be prompted to enter your email address to receive an email with a link to reset your password.

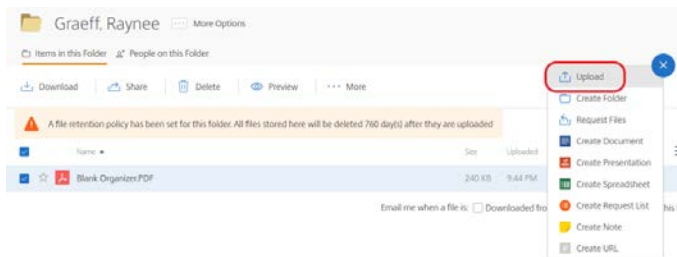
New Client

If you are a new user to ShareFile, you will receive an email notice that we have shared a folder with you. Upon receipt, select “Click here to view this folder” to create a password.



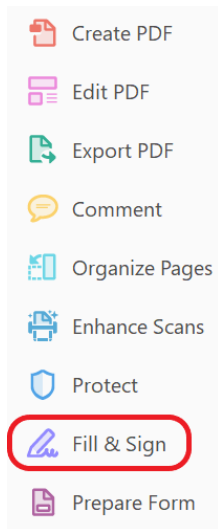
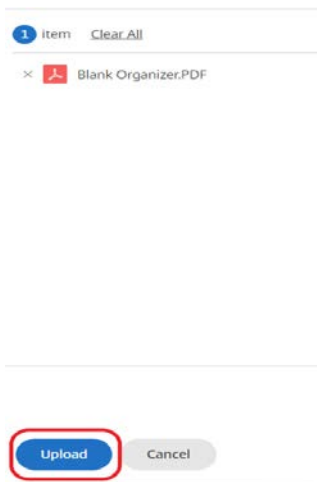
Downloading Documents

To download documents in your folder, check the box next to the document and select the “Download” button.



Uploading Documents

To upload your completed organizer and other tax documents to send to your tax preparer, select the blue “+” button in the top right corner, and then select “Upload”.



You will be prompted to browse computer files or drag files in for upload.

Once all items are included, select the "Upload" button in the bottom left corner to begin upload.

As the files are uploaded you will see the progress on the gray bar.

Upon upload completion, a time stamp will be added.

Completing Your Organizer

To complete your organizer using a PDF viewer (such as Adobe Acrobat Reader which is available for free [here](#)), download the organizer from ShareFile as specified above.

Once you have opened in Acrobat Reader, select "Fill and Sign" on the toolbar. This enables you to insert Text or use the X or ✓ button to add marks to the boxes you need to complete.

*Different versions of Acrobat Reader may render differently than the image shown.

Then select the text feature "Ab" in the top toolbar. Once selected, you are free to type anywhere on the PDF.

To answer yes or no questions, select "X" or the "✓" next to the item.

If you are using a different PDF viewer, the text feature may be in a different location. However, the steps will be similar.

Once your organizer is finished, save it to desired location and upload to ShareFile along with your remaining tax documents as specified above.

If you have any questions, please contact us at 512-258-6637.