SmartVault Step-by-Step for Tax Year 2021

Once you log into your SmartVault client portal:

1) Click **View Files and Folders** in the left-hand sidebar.
2) Note the **Public Documents - Helpful Resources** folder, which will be added to and updated as tax season goes along.
3) Select your household (or business) vault.
4) Select the current tax year (**TY21**).
5) Start with your **Client Organizer** folder.
    a) Read your **2021 Introduction & Engagement Letter** for your price, due dates, and the terms of our tax engagement.
    b) Agree to those terms by signing the bottom of the **Individual Questionnaire** and/or **Business Checklist** (see #7 for further instructions).
6) Download and print/view your **Individual Organizer**, which is prefilled with your prior-year numbers.
    a) Use the **Organizer** as a guide for collecting your tax documents, marshaling your Schedule C, E or F expenses, and alerting us to any changes in your address, dependents, etc. It is not required that you fill out or submit the **Organizer**, but you are welcome to do so, either by scanning and uploading it to your **Client Tax Data** folder, or delivering it to our Uptown office.
    b) Note: If you have a sole proprietorship or a rental, we ask that you provide a typed spreadsheet or summary, or fill out the **Organizer** pages for your Schedule C, E or F. Neatly handwritten numbers are fine, or you can find fillable PDFs of these Schedules in the **Public Documents** folder.
7) Fill out, sign and submit the **Individual Questionnaire** and/or **Business Checklist**. It is included as pages 4-7 of your **Organizer**, or you may print the standalone PDF file labeled "to print." The "fillable PDF" version can be filled out electronically with a typed "signature," saved, and uploaded to your **Client Tax Data** folder.
    a) **<u>This completed document must be received by our office prior to the start of your tax preparation services</u>**.
8) Upload all your tax documents to the **Client Tax Data** folder. Include all pages of all tax documents (especially for investment accounts!).
    a) We'd prefer one multi-page PDF file of your multiple documents, scanned all at once -- it is not necessary to separate out and rename each document.
    b) Keep all pages of a multi-page document together.
    c) If you are taking pictures of documents with your phone or tablet, know that our biggest headache is when photos are too small or low-resolution to enlarge sufficiently to read the tiny numbers. Best practice is to upload your photos to SmartVault, then view them on a big screen or monitor (not your phone screen) and zoom in to ensure all the numbers are clear and readable.
    d) Reach out to our team if you are unsure of the best way to get us your tax documents, and we will make a plan! (info@thebusinessguides.com, (360) 385-6961)
9) When you are DONE and your tax data is ready for review, navigate to your vault's TY21 > Client Tax Data folder and **<u>upload a new file with the file name "DONE" or "I'm Done."</u>** (We suggest uploading a photo of your family or your pet, to make us smile.) Find further instructions in the **Public Documents** folder.

For more guidance and resources, visit our webpage: <u>TheBusinessGuides.com/SmartVault</u>