

## 2025 TAX PREPARATION PROCEDURE

Please review the items under the “DOCUMENTS” tab of the website. The **2025 TAX TIPS** will assist with the preparation of your paperwork.

### **NEW FOR 2025 SEASON:**

We have subscribed to SafeSend for both electronic submission of documents and tax return delivery with convenient e-signature and credit card payments.

For those clients not using electronic means of document submission, we have also subscribed to SmartVault which utilizes DocuSign for e-signature of your tax returns once completed.

Many of you are already using the Protected Xchange from last tax season. You may still use this for document submission if you wish and the link is located below. Tax return delivery will still come from one of the two sources noted above.

<https://www.protectedxchange.com/cpagallo/login>

If you have a smartphone or tablet, you can use all three options above. **No scanner or printer is necessary;** only a free app on your phone/tablet (see resources below), although most newer phones have a scanner built in. More importantly, we get an email notification when you send documents through any option above which is very helpful to us.

I'd be happy to help anyone learn how to send documents digitally and securely. Please call the office and we'll make time to get you started. **We are no longer using NetClient for document upload.**

Call the office if you need direction before you drop off, upload or mail your tax documents for review and processing. Once your documents are processed, we will connect with you either by phone or email to advise if additional information is required to finalize your return. We can no longer prepare returns in person as the process has become too lengthy due to the complexity of tax law changes.

Pursuant to IRS guidelines, you will need to sign your 8879 form for electronic filing and any others necessary, **BEFORE FILING YOUR RETURN.** This form will be generated only at the completion of your return and will be sent by either **SafeSend** or **SmartVault.** Verbal authorization will not be accepted.

**Payment is required at the time your return is completed.** A Square URL for online payment will be generated at the completion of your return for convenience. All methods of payment are accepted at the office, however, due to significant mail issues, we encourage everyone to not mail checks.

Once signatures and payment is in place, your return will be filed. Hard or paper copies will be done on request **ONLY AFTER** tax season in an effort to keep costs down as the cost of paper and postage continues to rise.

**IF YOU RECEIVED YOUR RETURNS BY EMAIL, BE CERTAIN TO DOWNLOAD AND SAVE THEM SO YOU HAVE THE INFORMATION SHOULD YOU NEED IT IF WE ARE NOT IN THE OFFICE. RETAIN 7 YEARS OF TAX DOCUMENTS AS RECOMMENDED BY THE IRS.**

### **Resources you may find helpful:**

Free Apps for your phone or tablet will allow you to take pictures of your documents and email or upload to whichever destination you choose. These are available for both IOS and Android systems.

**Genius Scan** (PREFERRED) and **Adobe Scan** allow you to take photos and convert them to PDF's and also view and sign documents you receive by email.

Other apps clients like are **CamScanner** and **MileIQ** to track mileage (subject to software fee).