

HOW TO OBTAIN DIGITAL COPIES OF TAX DOCUMENTS FROM AN ONLINE ACCOUNT

In many cases, you may have received an email from your employer or financial institution inviting you to access your accounts to download tax documents. To take advantage of cost and time savings, follow the steps below:

- Log on to your account
- Follow any instructions provided by your employer or financial institution to access your documents in your online account. They will likely be in a section titled “Documents” or “Statements” or “Tax Information”.
- Select the document for the tax year that you need.
- Download or save the document to your computer.
- If you have trouble accessing your account or locating your tax document in your account, contact your employer or customer service of the institution for guidance.
- Retain the downloaded document along with your other digital copies of your tax documents.
- Upload all documents to your Client Portal at the time that you complete and submit your Tax Organizer.