How to Upload Your Tax Documents

Uploading your documents through our secure client portal is the fastest way to move your tax return forward — and it's always free.

Step 1: Open your secure portal link (check your email or click on the portal link on our website).

Step 2: Log in using your email and follow on-screen instructions.

Step 3: Click Upload or Add Files and select PDFs or clear phone photos.

Step 4: Notify us once your documents are ready.

Helpful Tips

• Lay documents flat and photograph in good lighting

• Upload all pages (front and back when applicable)

• Group similar documents together (W2s, 1099s, expenses)

Important

Uploading documents electronically is always free.

Physical document drop-offs are subject to our $50 Paper Document Processing Fee, plus $25 for sets over 75 pages.

Need help? Our team is happy to assist.