

Secure Document Upload Checklist

Uploading documents is secure but does not establish a client relationship until confirmed by our office.

Individual Tax Returns

Income	W-2s; 1099-NEC/MISC; 1099-INT/DIV; 1099-R; SSA-1099; 1099-G
Deductions & Credits	1098; Property taxes; Charitable contributions; Medical (if applicable); 1098-E; 1098-T
Other Required Items	Prior-year return; Photo ID (new clients); SSN/ITIN (new/changed); Bank info

Business / Self-Employed

Income	1099-NEC/K; Gross receipts; Sales reports
Expenses	Expense summaries; Bank & credit card statements; Payroll; Asset purchases
Business Records	Prior-year return; Formation docs (new); EIN letter

What NOT to Upload

Screenshots or partial docs	Incomplete information
Password-protected files	Cannot access
Zip files	Security restrictions
Unreadable documents	Cannot be processed
Duplicate documents	Causes delays
Non-tax personal records	Outside scope