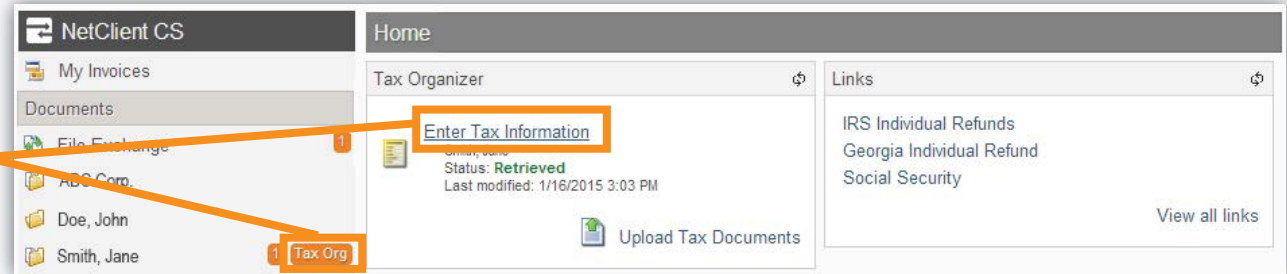


Filling Out Your Tax Organizer

Your Tax Organizer assists you in preparing for the upcoming filing season.

Accessing Your Tax Organizer

Click Tax Organizer icon or Enter Tax Information link from the home page.

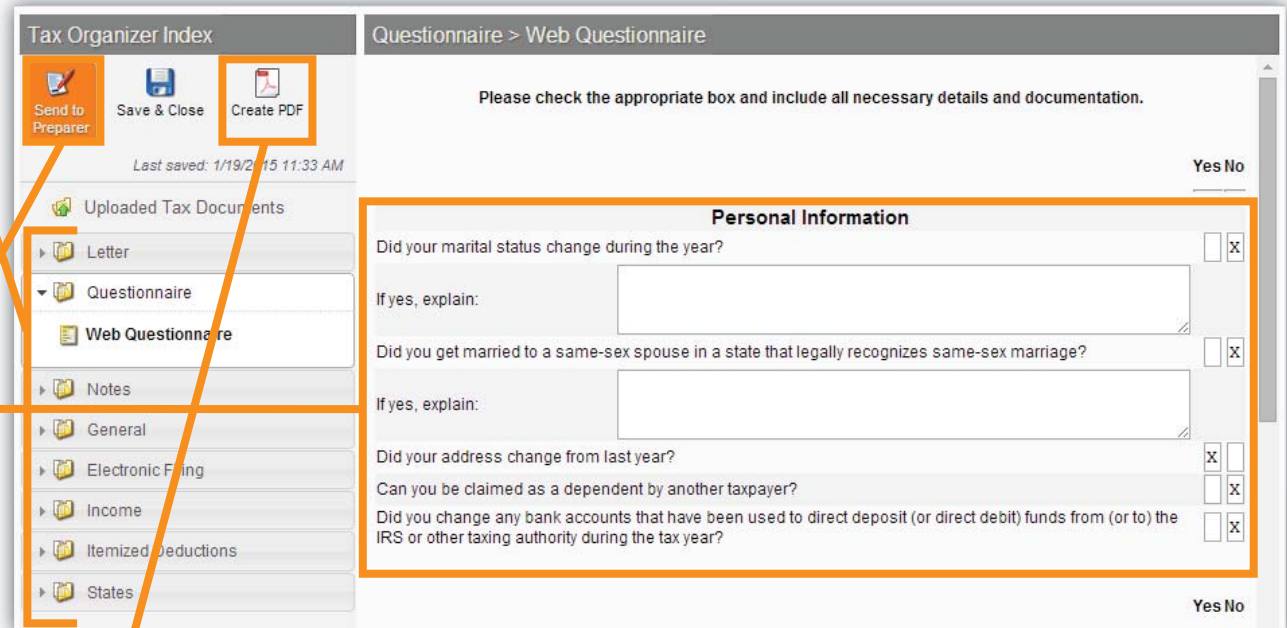


Completing Your Organizer Online

Links to the various sections of your Tax Organizer will be listed on the left side of the screen.

- Clicking on a section's name will expand and list any content for that section.
- With the exception of Letter, each section contains information you should review and enter/update.
- Once done, click Send to Preparer.

Note: If you cannot complete your organizer in one session, click the Save & Close button to save your completed entries. As a reminder, your Tax Consultant will not be notified until you click Send to Preparer.



Completing Your Organizer on Paper

If you prefer to complete your organizer on paper, click the Create PDF icon. From there, you can print and complete your organizer. You can then scan and upload the document or mail the completed paper document to your Tax Consultant.