Advocate Accounting Tax Information Submission Guide

If it meets your accessibility needs, we strongly encourage and prefer you to submit tax information through our client portal system.

Please note that we do not accept the following file types:

- ★ QuickBooks Desktop files
- ★ Google drive links and folders
- ★ Mac numbers files
- ★ Receipts, unless we specifically request them

Setting up a ShareFIle Client Account

Advocate Accounting now has secure client portals that enable easy sharing between you and our team.These portals allow you to upload and download your tax documents and completed tax returns at any time.

If you already have portal access, you can login here

If you do not yet have portal access please contact anis@advocate-accounting.com

Detailed instructions for accessing and using your portal can be found on the 2nd page of this document.

Alternative Submission Methods

Secure Uploads without a Portal

If needed, you can submit documents by using the link in your tax preparer's email signature. If unsure which team member you will be working with, use Anis' link.

Continued on Next Page

Paper documents can be mailed to:

Advocate Accounting LLC
120 State Ave NE #299
Olympia, WA 98501

Sending documents by postal mail may result in slower processing time. If you send documents by mail, **please send copies only - do not send originals.**

Accessing ShareFile Client account

Why

Your tax documents contain personal information so we want to implement strong cybersecurity measures. The platform ShareFile safeguards your documents and emails by using industry-standard encryption. Encryption protects private information from unauthorized access.

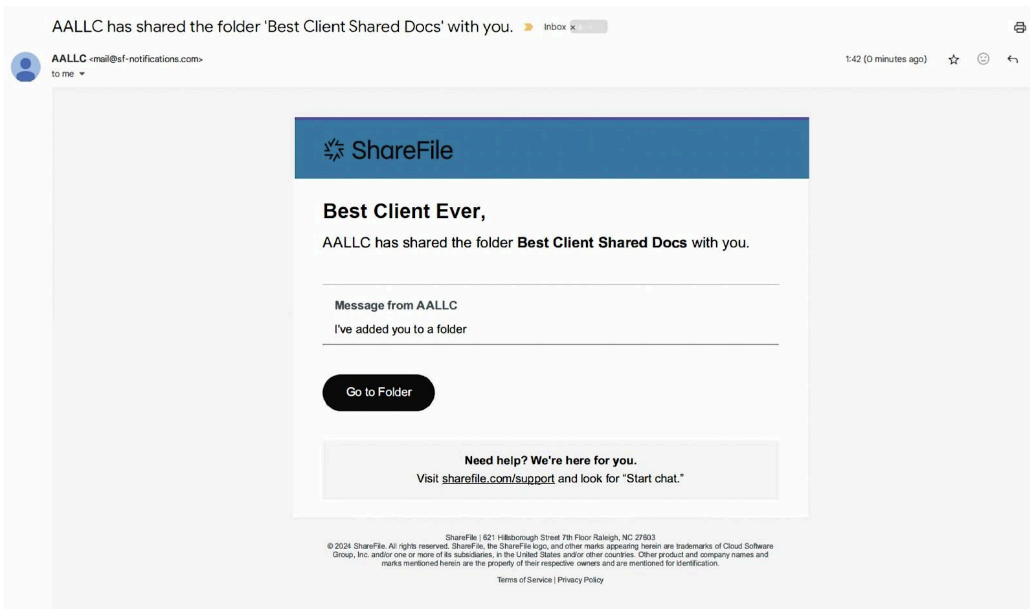
These portals also enable us to share documents with each other in one place, that we can both access later. You'll be able to upload and download documents, including prior year tax returns, using your portal.

How

Instructions below! Please contact Anis at anis@dvocate-accounting.com if a different set of instructions would better align with your access needs or if you need a new invite to set up your access.

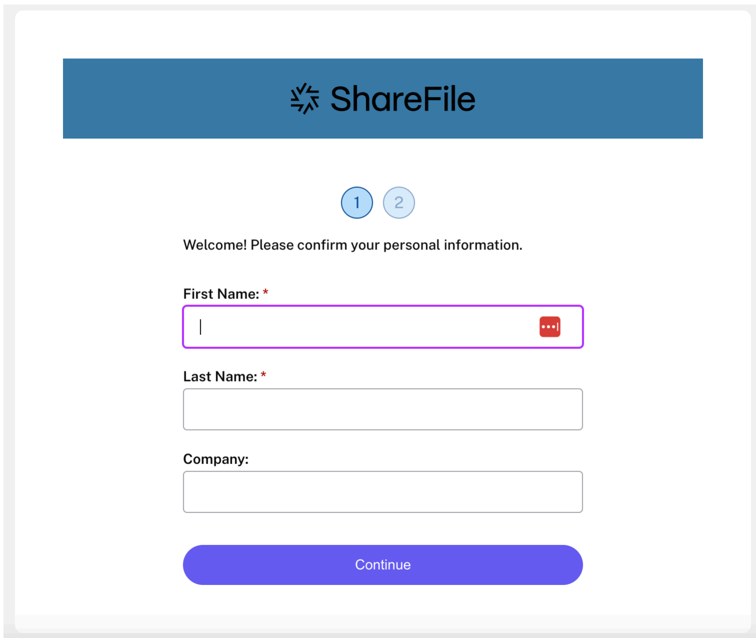
Continued on Next Page

1. You'll receive an email in either your inbox or junk folders from a staff member sharing your client folder with you (see image of the email below). Click the **Go to Folder** button in the body of the email.



Continued on Next Page

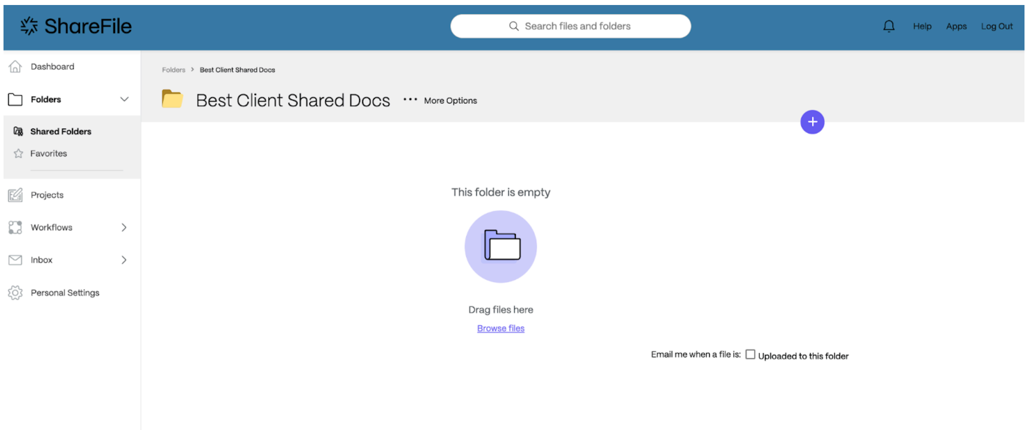
2. You'll be directed to a ShareFile window that will ask for your first name and last name (see image of the window below). Click **Continue**.



3. You'll be directed to a ShareFile window where you can create a password that has at least 8 characters in length, 1 upper case letter, 1 lower case letter, 1 number, and 1 special character. Click **Save and Sign In**.

4. You'll be directed to a ShareFile window where you can view files that our team has uploaded for you, such as your past year's tax returns, and you can upload your files securely to our team by clicking the lavender (+) button and selecting a file from your device or dragging a file from your device towards the lavender folder icon.

5. Once you've selected the file/s, click the **Upload** button. We appreciate you!



You can always access your folders by logging in here: advocateaccounting.sharefile.com

If your invite link expired before you were able to set up your access, please contact Anis at anis@advocate-accounting.com.