

# Tax Info Drop-off Prep:

Do you still bring us paper documents? Follow the guide below to see how to get the most out of your drop-off.



## STEP 1

Remove all documents from their envelopes.



## STEP 2

Remove all staples & paperclips.



## STEP 3

Write any notes to your preparer on full sheets of paper - no sticky notes!



## STEP 4

Include a summary for medical and/or donation receipts.



## STEP 5

Complete your online tax questionnaire.