

Instructions for Uploading Documents to SmartVault

1. Upload your current year tax documents to the Client Source Documents folder.
2. **PDF's, Word and Excel** are the only allowable file types to upload to the portal.
3. **Best Practice** combining and uploading a single PDF of all your tax documents will expediate your income tax return preparation and processing. If possible, please upload one single PDF in lieu of multiple PDF files.
4. **Do not** upload password protected files. If you need assistance with unprotecting files, please contact Stephanie Wilms at stephaniewilms@hurstkelly.com.
5. **File Names** - please be aware that the file name you assign to each of your uploaded document(s) is **not** visible to us when we prepare your returns. Therefore, any information that you want to convey to us, that is not determinable by looking at the actual uploaded document, **must be communicated to us in another way** – such as, in notes in a Word file. If you have any questions regarding this, please contact our office.
6. Once you have uploaded **all** your documents to SmartVault and your tax returns are **ready to be prepared**, please send an email to info@hurstkelly.com (with your full name and cell phone number in the body of the email). Our office will not begin preparing your income tax returns until we receive this email.
7. If you receive **additional documents** or become aware of **additional information** after you have emailed info@hurstkelly.com, please email stephaniewilms@hurstkelly.com to coordinate our receipt of your additional information.
8. Please feel free to reach out to our office with any questions about your submission of electronic documents to Stephanie Wilms at 513-234-0977 (extension 106) or email her at stephaniewilms@hurstkelly.com.