Thanks for using the secure portal. It’s so much safer for you than email!

PDFs are preferred. If you're working from your phone, see if you have a PDF app rather than using the camera.

Please don’t create multiple folders. It actually makes it harder for me!

I don't need documents separately scanned & titled. Honestly, I’ll figure out what they are!

* One PDF of multiple scanned documents is fine.
* One PDF of IRS-numbered documents and one of miscellaneous others is ideal.
* If you download a document as a separate PDF (a W-2 or brokerage 1099) keeping that separate is great.

Pictures are OK if you can't scan to PDF. Make sure they include everything and are legible and well-lit.

If you have a spreadsheet, don't convert it to PDF. The spreadsheet is easier for me to work with.

A Word doc is fine. It doesn't need to be converted to PDF. But I can’t read .NUMBERS or .PAGES files.