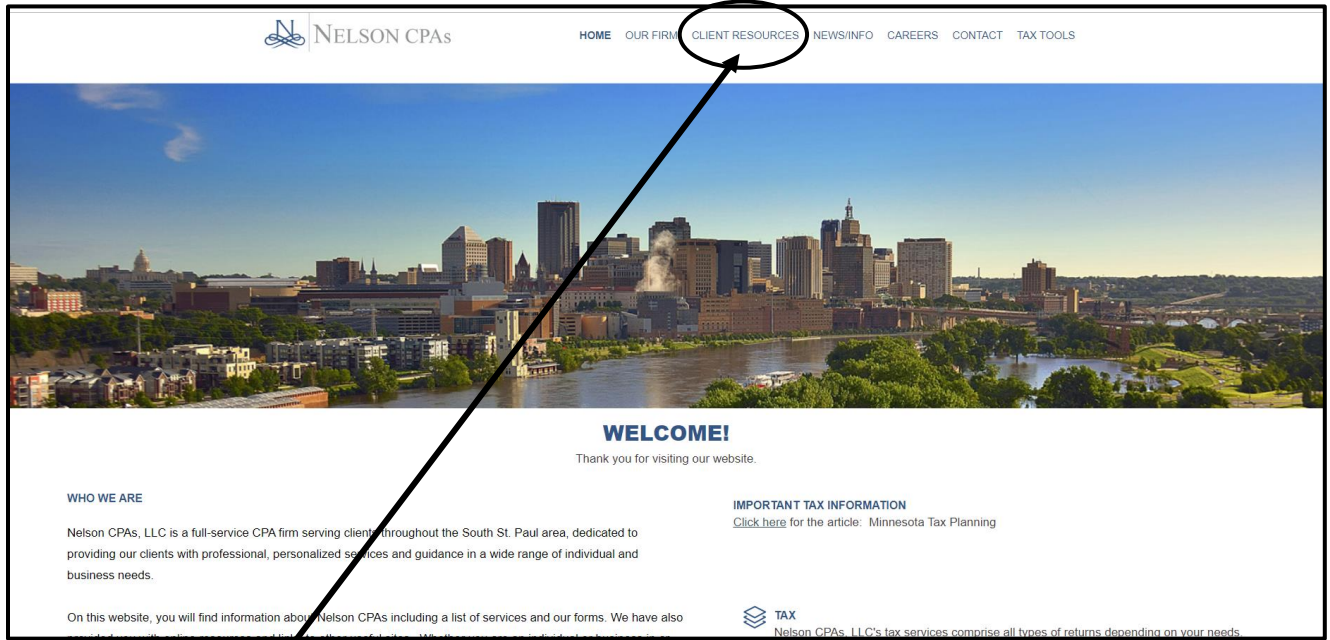


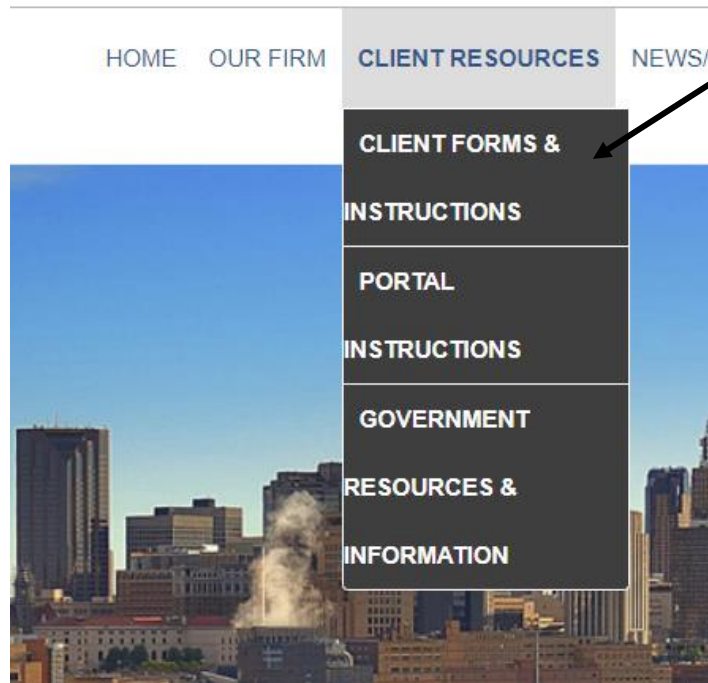
How to Access the Tax Organizer

1. Go to the Nelson CPAs, LLC website: www.nelsoncpasmn.com

You should see this screen:



2. Click on “Client Resources” on the top of the screen and then “Client Forms and Instructions”

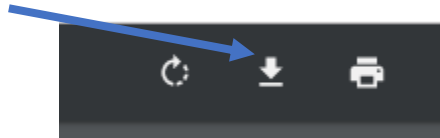


3. Click on “2020 Organizer” under the “Individuals” section

Individuals

[Consent to Use of Tax Information](#) - Allows us to k
[Consent to Disclose Tax Information](#) - Allows us to
[Consent to Request Tax Information](#) - Allows us to
[2020 Individual Engagement Letter](#) - We must hav
[2020 Organizer](#) - You need Adobe Reader DC for
[Bank Information Form](#) - We must have this compl
[Taxpayer Information Sheets](#) - Please fill out comp

4. Save or print a copy of the Organizer by completing either Steps 4a or 4b.
 - a. Save a copy of the Organizer (a fillable form) to your computer
 - i. Select the “Download” icon (down arrow) in the upper right screen



- ii. Select a location on your computer where you want the file to reside
- iii. Enter a file name
- iv. Select “Save”
- v. Complete the tax organizer on your desktop using the fillable form
 1. Must have the free app Adobe Reader DC
 2. Click on “Fill & Sign”
 3. Select “You” to the question “Who needs to fill and sign?”

Who needs to fill and sign?	
You Fill form fields, add text and draw or type your signature.	Others Add signers, mark where to fill and sign, send it out and track progress.
Fill and sign	Request signatures

4. Click in either the “yes” or “no” box; type in the boxes requesting addition information
 5. Save
 6. Once you are done, upload the completed Organizer to your portal, or print out and mail in with your other documents and NCPA forms
- b. Print a paper copy of the Organizer
 - i. Select the “Printer” icon in the upper right screen
 - ii. Select your printer
 - iii. Print
 - iv. Complete your tax organizer by hand

5. Deliver the following (all together) to our office by uploading to your secure portal, putting them in our drop box, or mailing:
 - a. Completed Organizer
 - b. Personalized pages from the Organizer, if provided (lilac sheet(s) mailed to you)
 - c. Signed Engagement Letter (green sheet mailed to you)
 - d. Signed Bank Information Form (blue sheet mailed to you)
 - e. Taxpayer Information Form (pink sheet mailed to you)
 - f. Tax documents