



Client Guide for Sending Files

Please follow these guidelines when sending us your files such as brokerage statements, K1s, and other financial documents.

DO NOT SEND IMAGE FILES

Files such as JPG, Png, and other image files are not acceptable and will hinder our ability to complete your return. Please do not send us photos of files taken from your phone.



SEND PDFS

PDFs are the preferred file to send us for work papers. Sending PDFs will allow us to expedite your return and get the work done efficiently.

SEND EXCEL FILES

We also can accept excel files. Please make sure to not password lock the excel files before sending or to include password instructions.



SEND FILES SECURELY



Send files with sensitive information, such as SSN's or bank statements, with our secure file transfer system ShareFile. Sharefile transfer is available on all-cpas.com/online-tools/ and also in a secured link provided by your accountant.