ALL CPAs

TAX ▲ ACCOUNTING ▲ ADVISORY

Client Guide for Sending Files

Please follow these guidelines when sending us your files such as brokerage statements, K-1s, and all other financial documents.

DO NOT SEND IMAGE FILES

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

SEND PDFs

PDFs are the preferred file format 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 do not add a password lock on any files. They are automatically secured when sent with ShareFile.

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.