

Submitting Your Tax Documents - Best Practices

To ensure a smooth and efficient process for handling of your tax documents, here are some helpful recommendations for submitting your source documents:

1. **If mailing or dropping off documents to our office, please provide the ORIGINAL DOCUMENT rather than a copy.** Your original documents will be returned to you when your tax return is assembled.
 - Please **DO NOT STAPLE** documents together. Use paper clips, if needed.
2. **Tax documents directly downloaded from your financial institution is preferred.** If you have online access, download tax statements and include with your tax documents. If submitting electronically, please be sure to submit using our **secure ShareFile platform (see point #3)**.
 - Another option is to contact your financial advisor and authorize them to send tax statements directly to Intake@CoverRossiter.com using their secure file share platform, or using C&R's ShareFile platform (see point #3).
3. **If submitting documents electronically (via email):** We strongly encourage you to send your documents using our **secure ShareFile** upload platform. Go to www.CoverRossiter.com and click on **Client Support / Secure File Sharing**. Under **File Upload**, use intake@coverrossiter.com for recipient email address.
 - For best quality, please do not submit photos of documents. If possible, convert photo to a PNG or PDF format before sending.
4. **Tips for Scanning / Printing Documents:**
 - ✓ Scan / print settings of 300 DPI, black and white scans are preferred.
 - ✓ Ensure the pages are scanned/printed in the correct orientation, i.e. Landscape documents (*e.g. 1099 Consolidated investment broker statements*) scanned in landscape format, portrait documents in portrait format.
 - ✓ Keep all pages of a multi-page document together.
 - ✓ Only scan/print one source document per page. For example, if you have two unique 1099-INT statements that fit on one page, please scan each on a separate page.
 - ✓ (Scanning only) Save documents as PDF, PNG or TIFF only.
 - ✓ (Scanning only) Source document files should be deskewed, if this option is available on your scanner.
 - ✓ (Scanning only) Please do not use the despeckle function when scanning for submission to our office.
 - ✓ (Scanning only) As a rule, if you are having trouble reading the scanned document; we will also have difficulties. Please rescan and adjust scanner settings if necessary.

If you have any questions, call us at 302-656-6632 or email Intake@CoverRossiter.com