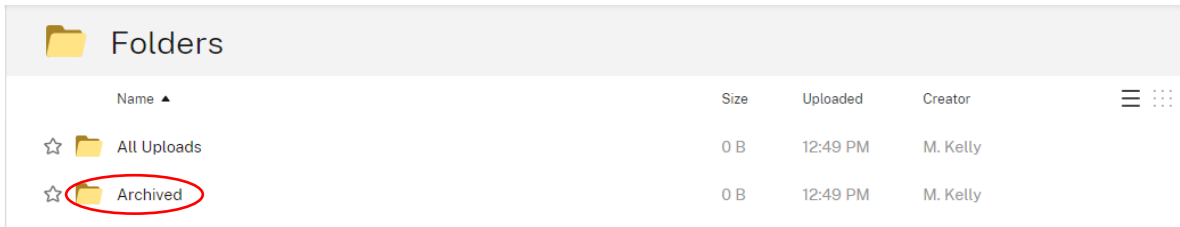




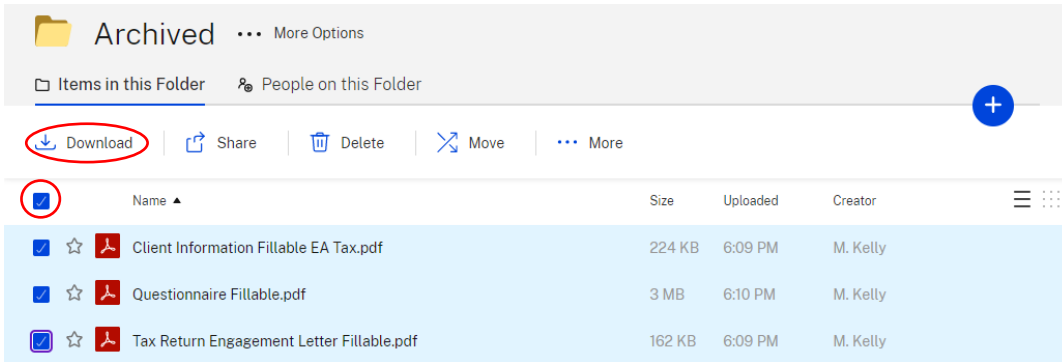
## How to Download and Upload New Client Forms

1. Click this link <https://eataxexperts.sharefile.com/> to login to your Sharefile Account. If you need help logging in, use the [How to Login to your ShareFile Account](#) instructions.

2. Click 'Archived' Folder

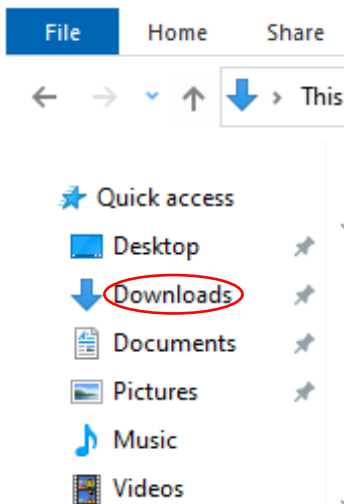


3. Check the top box to select ALL boxes below pertaining to 'Client Information', 'Questionnaire' and 'Tax Return Engagement Letter' PDFs. Then click 'Download'.

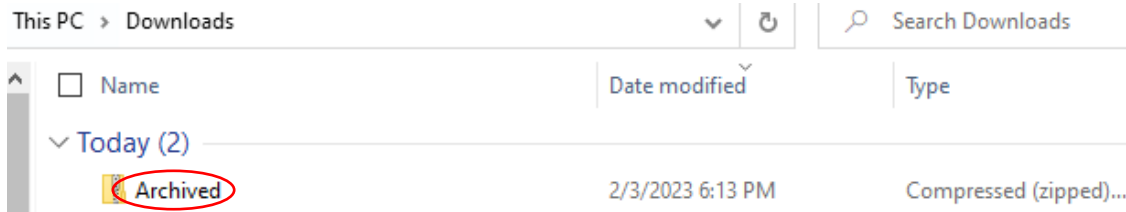


Email me when a file is:  Downloaded from this folder  Uploaded to this folder

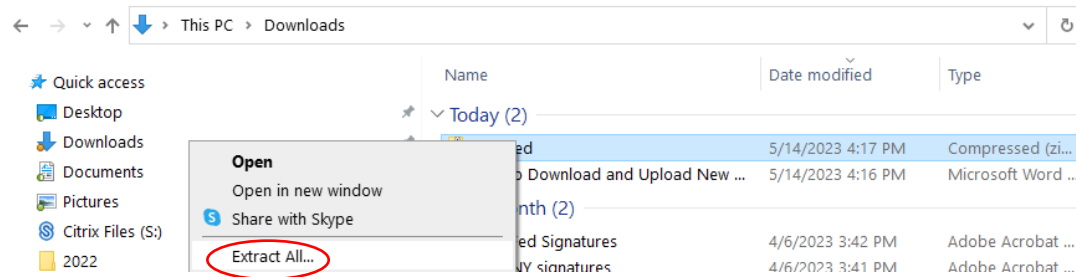
4. Now it can be found in your PC's "Downloads."



## 5. Right click the 'Archived' Folder

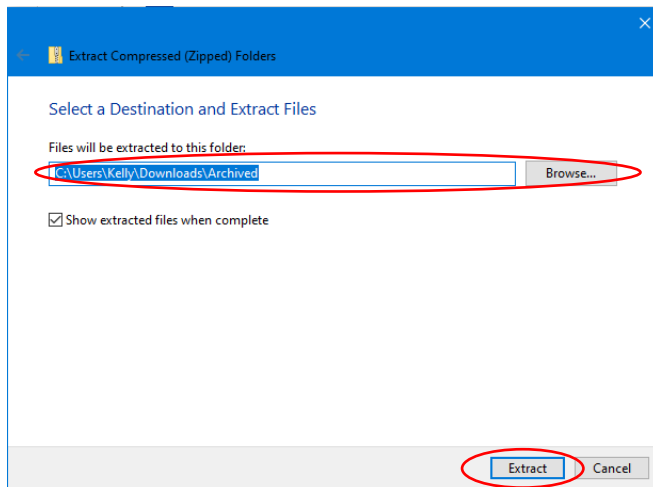


## 6. Click 'Extract All...'



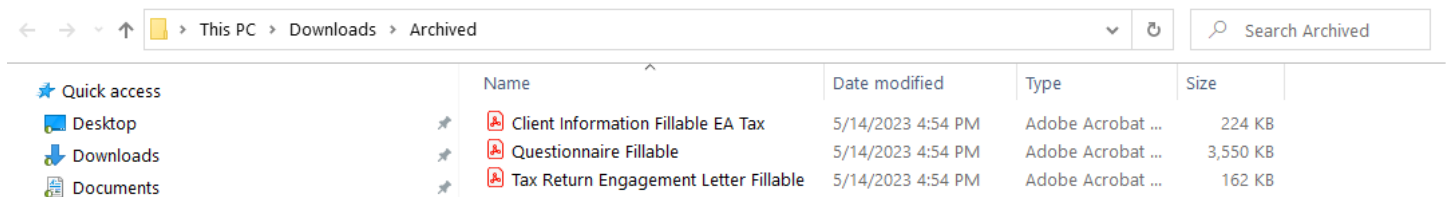
## 7. Make sure download destination is the 'Downloads' folder.

## 8. Click 'Extract'



## 9. Your extracted 'Archived' folder is now open and it can be found in downloads!

## 10. Left click a file to automatically open in a PDF viewer such as Adobe, Microsoft Edge or etc



## 11. Enter your information into the fillable PDF

Client Information Fillable EA Tax.pdf - Adobe Acrobat Standard 2020

File Edit View Window Help

Home Tools Client Information ... x

CLIENT CODE \_\_\_\_\_ TAX YEAR: \_\_\_\_\_ DATE REC'D \_\_\_\_\_  
HOLD FOR CORP \_\_\_\_\_  
PARENT/CHILD OF \_\_\_\_\_ OFFICE USE ONLY

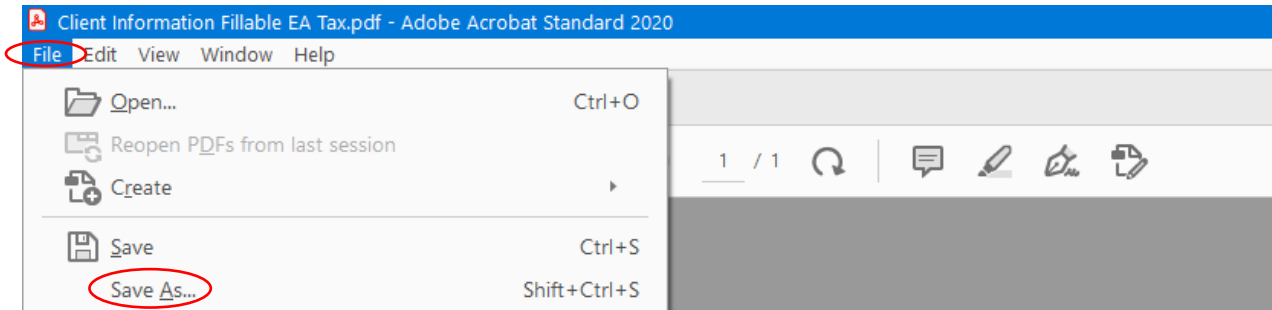
EA Tax Experts  
TAX CLIENT DATA SHEET

MY FILING STATUS:  
 Single  Married Filing Joint  Married Filing Separate  Head of House  Qualifying Widow(er)

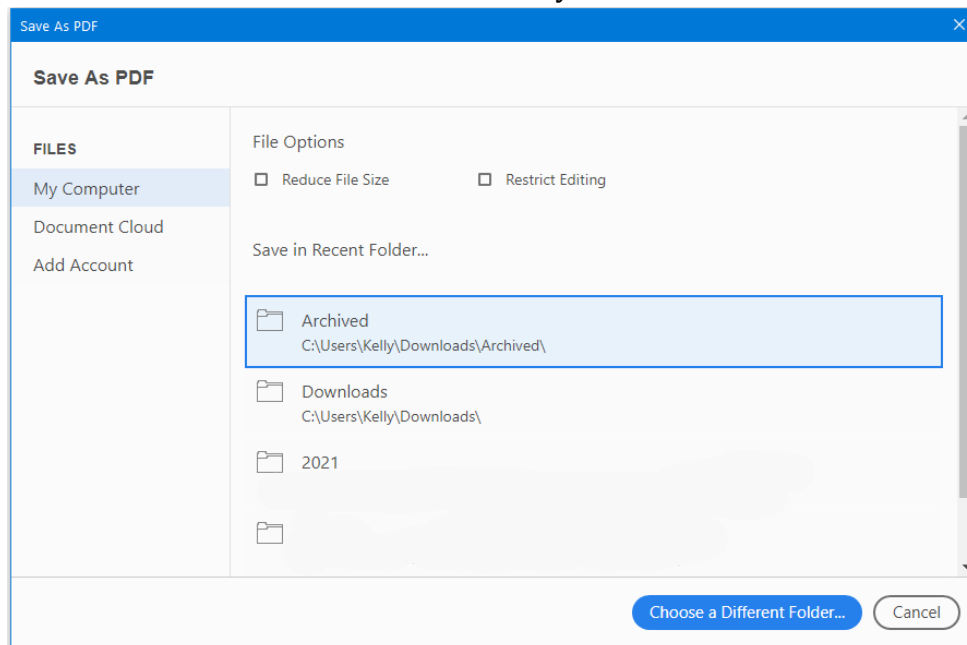
PRIMARY TAXPAYER			SPOUSE		
NAME: LAST, FIRST, MIDDLE INT.			NAME: LAST, FIRST, MIDDLE INT.		
SSN	DOB		SSN	DOB	
OCCUPATION			OCCUPATION		
PHONE: DAY <input type="checkbox"/> EVENING <input type="checkbox"/> CELL <input type="checkbox"/>			PHONE: DAY <input type="checkbox"/> EVENING <input type="checkbox"/> CELL <input type="checkbox"/>		
EMAIL ADDRESS			EMAIL ADDRESS		

## 12. Click 'File' on your specific PDF viewing software

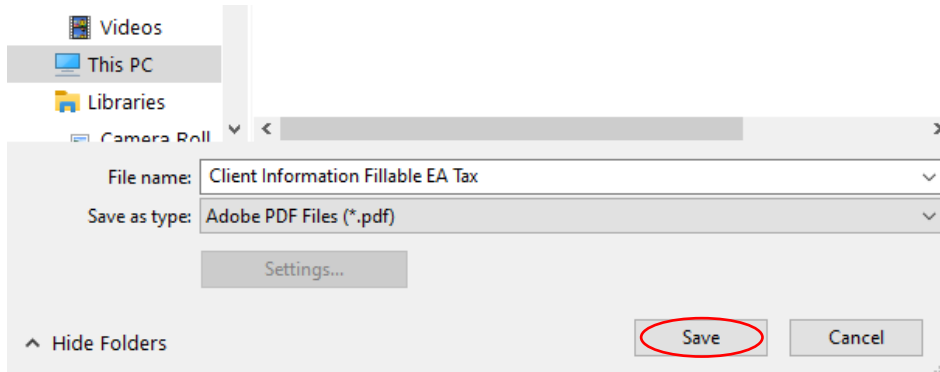
## 13. Click 'Save As..'



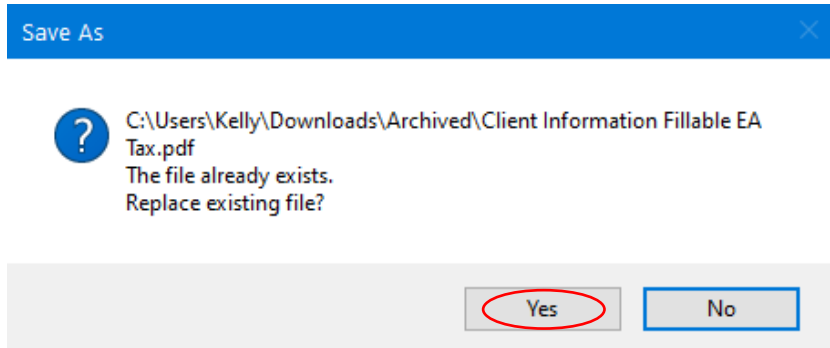
## 14. Double left click 'Archived' folder from your Downloads.



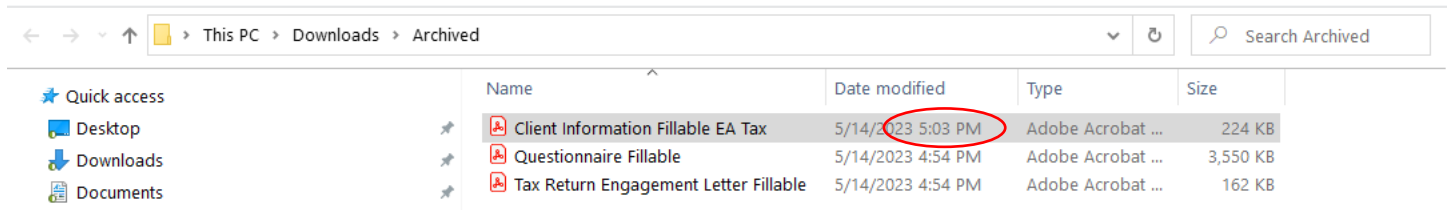
**15. Click 'Save'**



**16. Click 'Yes'**



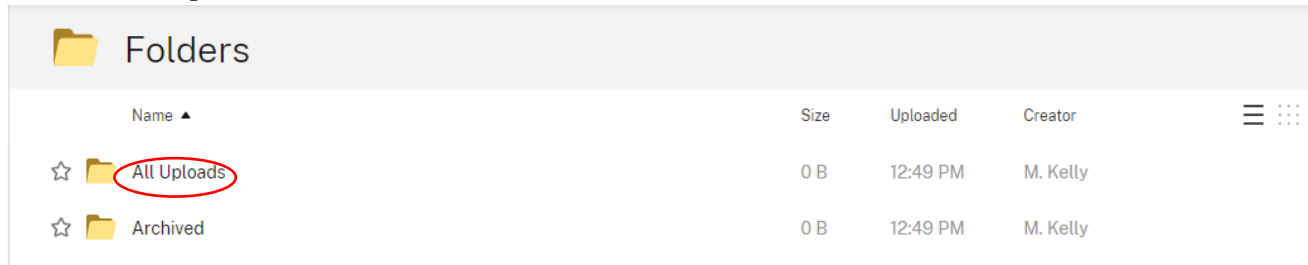
**17. Notice the Date Modified time has updated on the document filled out and saved.**



**18. Repeat Steps 9 through 16 with the remaining two documents.**

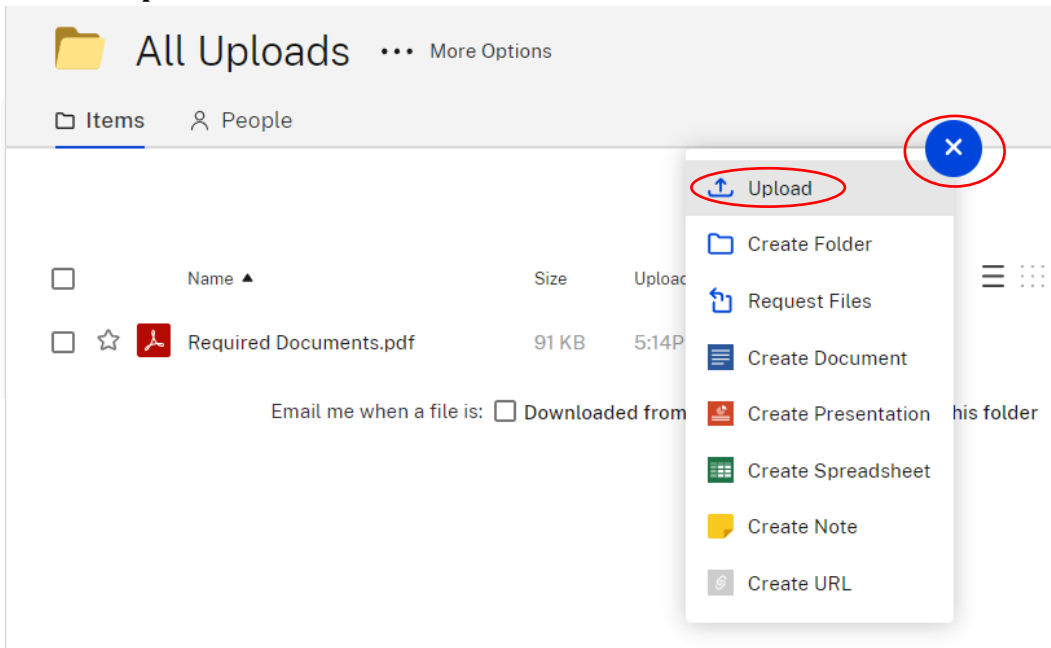
**19. Click this link <https://eataxexperts.sharefile.com/> to login to your Sharefile Account.**

**20. Click 'All Uploads' Folder**



21. Click the + symbol

22. Click 'Upload'



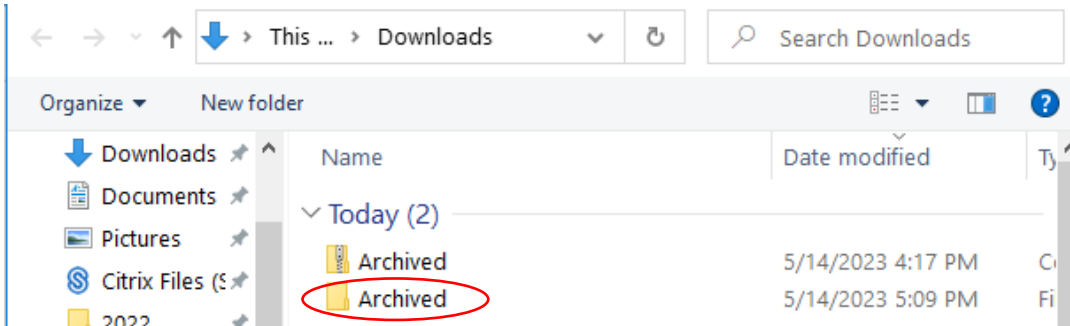
23. Click 'Browse Files'



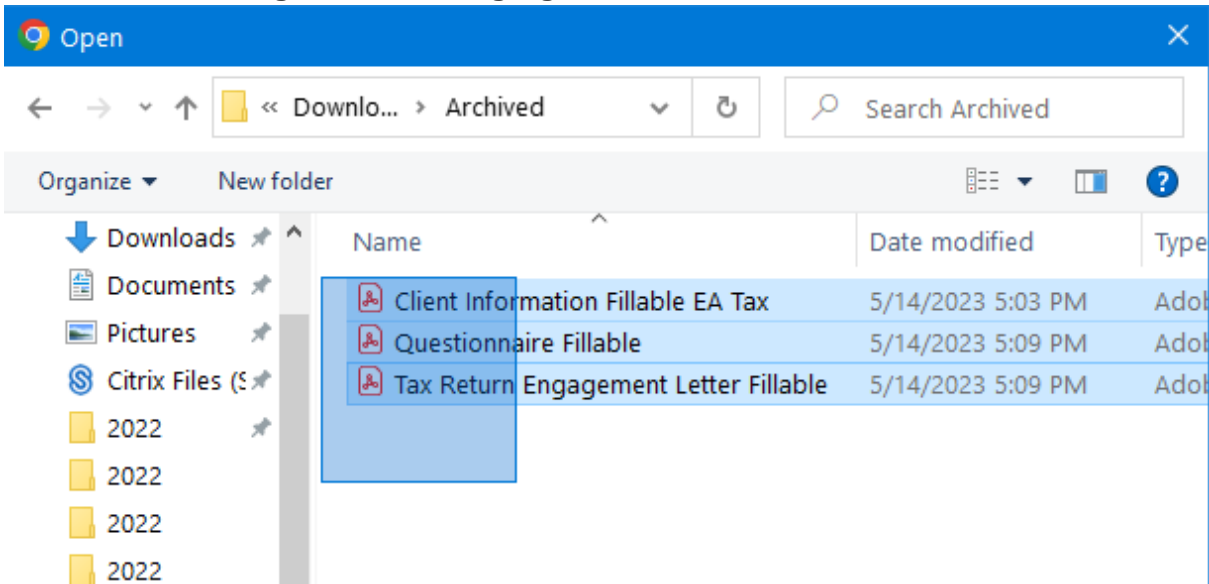
Drag files here

[Browse files](#)

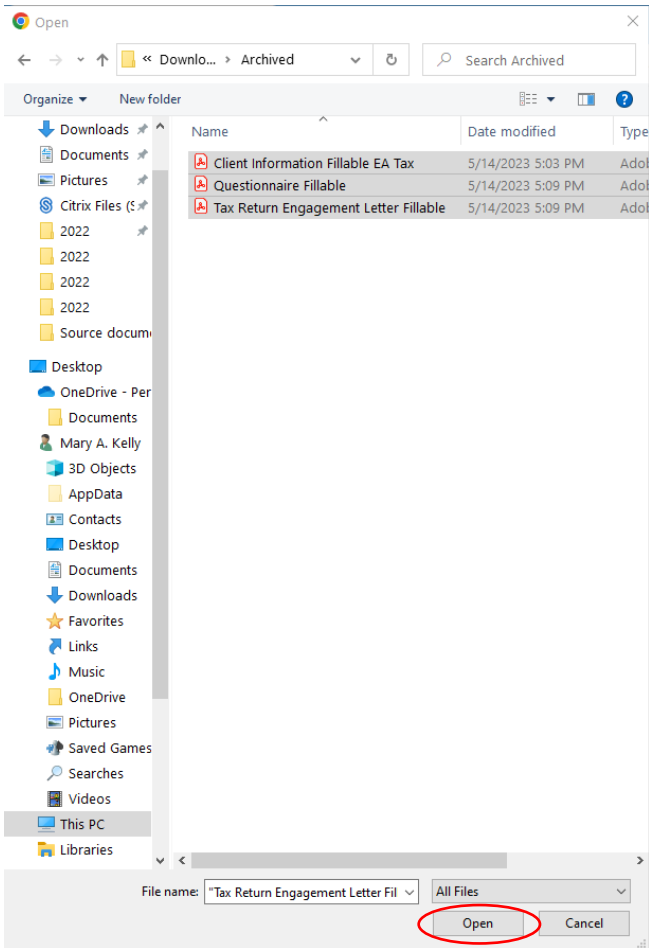
24. Click on the extracted 'Archived' which is the one without the zipper icon



**25. Left Click and drag the cursor to highlight each document**






**26. Now that each document is selected in your 'Archived' folder click 'Open'**




## 27. Now that each document is selected in Sharefile click 'Upload'


3 items [Clear all](#) [+ Add more](#)








X	 Client Information Fillable EA Tax.pdf	223.62 KB	<a href="#">Edit</a>
X	 Questionnaire Fillable.pdf	3.47 MB	<a href="#">Edit</a>
X	 Tax Return Engagement Letter Fillable.pdf	161.86 KB	<a href="#">Edit</a>



## 28. Congratulations! You have learned how to upload and download documents through Sharefile! Now we can securely receive your sent documentation and provide you with important documentation! All of which gives you the fastest quality tax service!

 All Uploads [More Options](#)

[Items](#) [People](#) 

<input type="checkbox"/>	Name ▲	Size	Uploaded	Creator	
<input type="checkbox"/>	  Questionnaire Fillable.pdf	3 MB	5:36PM	E. Admin	
<input type="checkbox"/>	  Client Information Fillable EA Ta...	224 KB	5:36PM	E. Admin	
<input type="checkbox"/>	  Tax Return Engagement Letter ...	162 KB	5:36PM	E. Admin	