

# Intuit Link

To better serve you, I have started utilizing a secure online platform through my tax software called Intuit Link. This year and moving forward, I can provide everything you received in this packet, online through a secure web portal. You can also submit your tax documents to me using this platform. No more piles of paper or missing forms!

If you are interested, simply send me an email to [bfitzgerald@bfcpallc.com](mailto:bfitzgerald@bfcpallc.com) or provide your email address and mark the Intuit Link box on your Questionnaire. I will send you an email inviting you to your new Intuit Link account where you can submit your documents to me electronically, by snapping a picture on your mobile phone and hitting upload or scan using your computer! It's that easy! See below for more reasons to use Intuit Link and see the following pages for snapshots of the program and instructions on how to use it. Connecting your financial accounts is completely optional.

## What is Link?

Intuit Link is an online portal for you and your accountant to connect and deliver tax documents to complete your tax return. No more bulky tax packets or piles of paper. Now you can deliver your information simply and securely online.



### Step 1

Receive email from your accountant.



### Step 2

Click the link in the email.



### Step 3

Answer questions from your accountant.



### Step 4

Connect your financial accounts.



### Step 5

Upload documents or photos, even from a mobile device.

## Fast!

Make your tax season more efficient! Submit your documents as you receive them and link your account to download W-2's and 1099's from over 300 financial institutions as soon as they are available!

## Smart!

Start prepping sooner! Help me prepare ahead of time by submitting answers to my questionnaire and engagement letter. I will contact you with follow-up questions or document requests if necessary.

## Secure!

Data is secure using bank-level security and available year-round for you to retrieve if you need copies of documents for banking, financial planning, etc.

## Your documents are always with you!

- Need a copy of your W-2 for the bank? Simply log in to your Intuit Link account to find all the documents you submitted for your tax return, all in one place!
- Need a copy of your tax return? Years down the road, you don't have to hunt down that paper copy you stored away somewhere. Simply log in to your Intuit Link account and find copies of all your prior year returns!