



Getting started with Intuit Link

What is Intuit Link?

Intuit Link is an online portal for you and your accountant to connect and share 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)

Access Intuit Link

To begin, open the invitation email from your accountant.

ACCEPT invitation or **SIGN IN** to access Intuit Link.

Returning users:

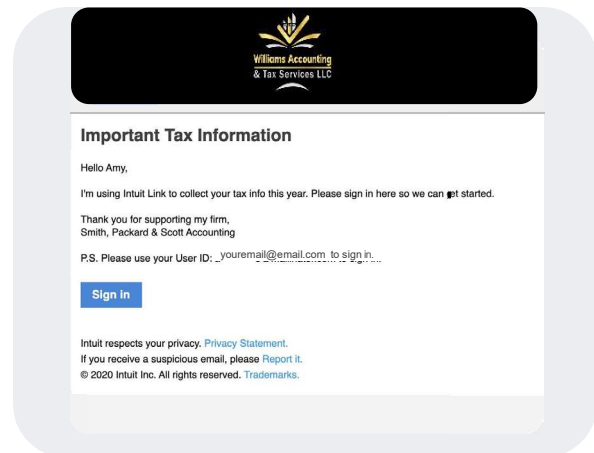
If you have used Intuit Link before or have an existing Intuit account **SIGN IN** (do not sign up) with your existing credentials.

New users:

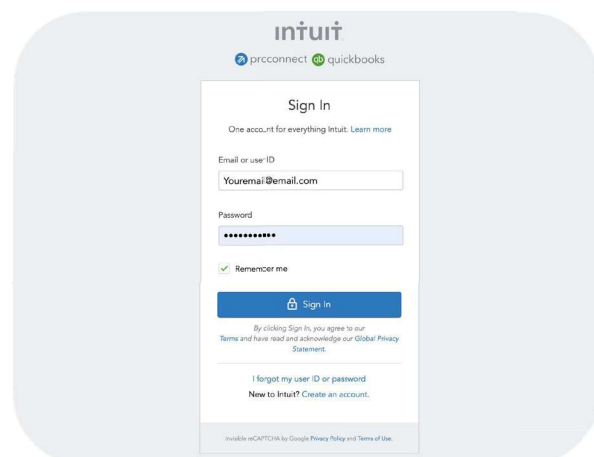
If this is your first time using Intuit Link **SIGN UP** using the **SAME** email address from your invitation.



Quick Tip: Your sign in email and invitation email should be the same.



Sample email invitation to use Intuit Link from your accountant.

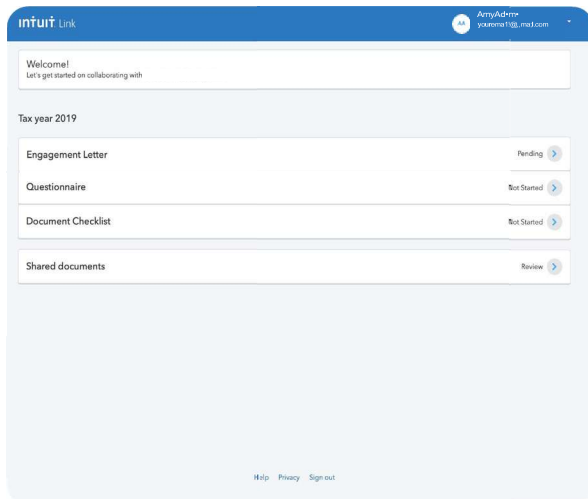


Sign in screen for Intuit Link.

(STEP 2)

Understand your Intuit Link

Intuit Link is home to all your requests for key information related to your upcoming tax return including your engagement letter, questionnaire, document checklist and shared documents.



Intuit Link homepage.

Engagement letter

Read, review, and sign your terms of agreement with your accountant.

Questionnaire

Answer a set of questions your accountant needs to prepare your tax return.

Document checklist

Review and share the documents your accountant needs to complete your tax return.

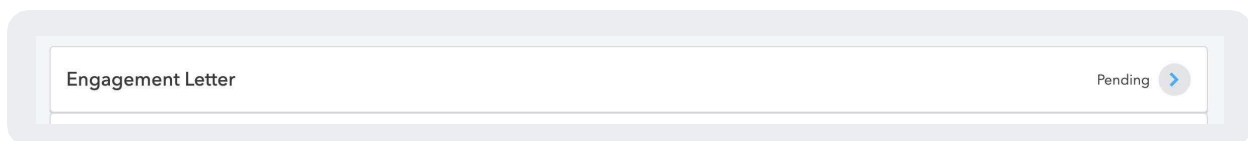
Shared documents

All your tax documents can be stored within Intuit Link.

(STEP 2)

Share Info With Accountant

First step, sign your engagement letter.

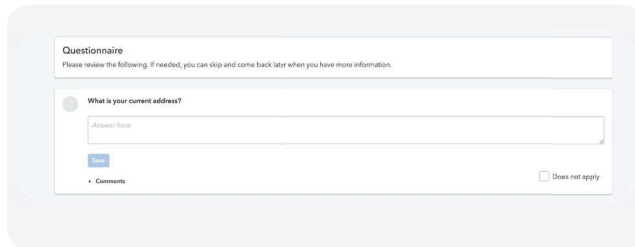


Open the engagement letter, review the agreement, then type your name to **ACCEPT** agreement. Once you **ACCEPT**, your agreement will be sent back to your accountant for review and marked **DONE** on your Link homepage.

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Next, complete the questionnaire.

Select a question from the list and type your answer in the respective field. **Save** your response to each question or mark **Does not apply** if the question doesn't apply to your tax situation.



Questionnaire
Please review the following. If needed, you can skip and come back later when you have more information.

What is your current address?

Answer here

Save

Comments

Does not apply

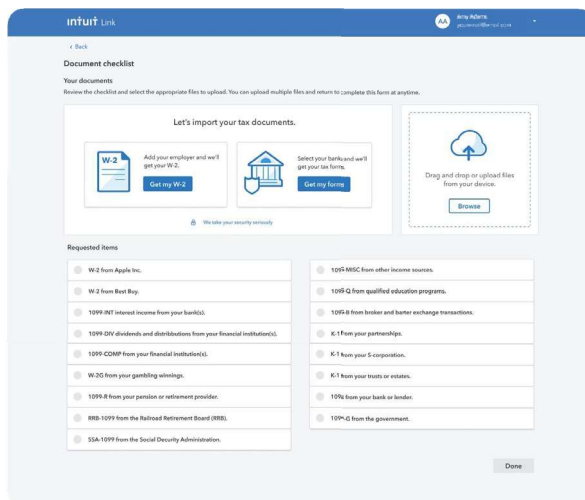
Sample question from Questionnaire.

Select **Comments** to leave a note and **Post** to share it with your accountant (optional).

Continue this for each question listed and **Submit** to send responses to your accountant.

Final step, share your documents.

Add to your employer and financial institutions to securely pull in your tax forms and quickly share them with your accountant. You can also drag and drop them into the dotted area or **Browse** to upload files from your device.



intuit Link

Document checklist

Your documents

Review the checklist and select the appropriate files to upload. You can upload multiple files and return to complete this form at anytime.

Let's import your tax documents.

W-2 Add your employer and we'll get your W-2. Get my W-2

Select your bank and we'll get your tax forms. Get my forms

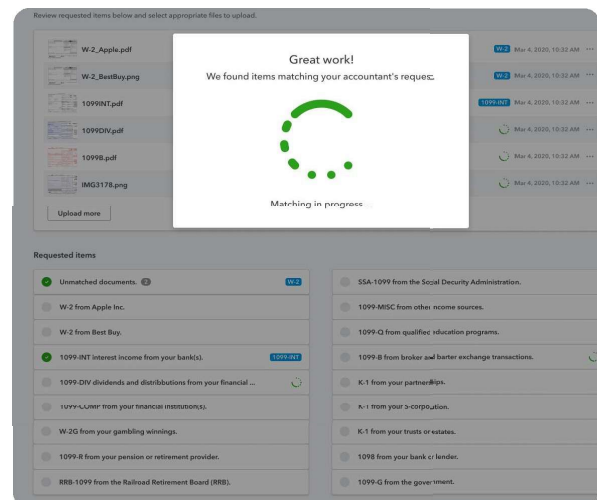
Drag and drop or upload files from your device. Browse

Requested items

- W-2 from Apple Inc.
- W-2 from Best Buy
- 1099-INT Interest income from your bank(s).
- 1099-DIV dividends and distributions from your financial institution(s).
- 1099-COMP from your financial institution(s).
- W-2G from your gambling winnings.
- 1099-B from your pension or retirement provider.
- 888-1099 from the Railroad Retirement Board (RRB).
- SSA-1099 from the Social Security Administration.
- 1099-MISC from other income sources.
- 1099-Q from qualified education programs.
- 1099-B from broker and barter exchange transactions.
- K-1 from your partnerships.
- K-1 from your S-corporation.
- K-1 from your trusts or estates.
- 1098 from your bank or lender.
- 1099-G from the government.

Done

Document checklist view with sample request.



Review requested items below and select appropriate files to upload.

Great work!
We found items matching your accountant's request.

Matching in progress

Requested items

- Unmatched documents.
- W-2 from Apple Inc.
- W-2 from Best Buy
- 1099-INT Interest income from your bank(s).
- 1099-DIV dividends and distributions from your financial ...
- 1099-COMP from your financial institution(s).
- W-2G from your gambling winnings.
- 1099-B from your pension or retirement provider.
- 888-1099 from the Railroad Retirement Board (RRB).
- SSA-1099 from the Social Security Administration.
- 1099-MISC from other income sources.
- 1099-Q from qualified education programs.
- 1099-B from broker and barter exchange transactions.
- K-1 from your partnerships.
- K-1 from your S-corporation.
- K-1 from your trusts or estates.
- 1098 from your bank or lender.
- 1099-G from the government.

Matching uploaded documents with requested items.

Viola, Intuit Link will match selected files to your **Document checklist** and notify your accountant as your documents are matched.

Great job, your work here is done.