

TaxesToGo

Tax Preparation App

User Guide



For more information go to [TaxesToGo.com](https://www.TaxesToGo.com)

TaxesToGo is an easy and secure way to send your tax documents to your professional tax preparer from anywhere, at any time.

Here's how to get started...

1. Go to the App Store or Google Play to download a version compatible with your mobile device.
2. Tap "Sign Up" and enter a username, email address and password (eight characters minimum with one number and one non-letter character).
3. Answer the question "Are you Married?". Then select "Yes" or "No" and swipe left to move to the next screen.
4. Scan the barcode on the back of your license to populate your personal information.
5. Capture photos of your tax documents as you are prompted.
6. Take a selfie when prompted. Your tax preparer will use this image of you as an added level of security.
7. Review and edit your personal information.
8. Add applicable social security numbers.
9. Add dependents if applicable.
10. Enter your best contact phone number so that your tax preparer can call you with additional questions if needed.
11. Review your information and documents.
12. Submit your information and documents.

13. The app will give you a Tax Number. Give your tax preparer the Tax Number and your last name. Once you provide that information to the preparer, your tax return can be prepared.
14. Once your return has been prepared, you will receive a notification to review and sign your documents and return.

NOTE:

You can use the chat feature to communicate with your tax preparer at any time.

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