

How to Organize Your Tax Documents Before Uploading

A few minutes of organizing before you upload means fewer follow-up questions and a faster, more accurate return. Follow these six steps to prepare a complete, easy-to-review document package for our team.

TAX | PAYROLL & HR | BOOKKEEPING | ADVISORY

1 Gather All Tax Documents

Start by collecting every tax-related document you received during the year. Use this checklist as you go:

- | | |
|---|---|
| ☐ W-2 forms | ☐ Property tax statements |
| ☐ 1099 forms (NEC, MISC, INT, DIV, R, SSA, etc.) | ☐ Retirement contribution records |
| ☐ Brokerage and investment statements | ☐ Charitable contribution receipts |
| ☐ Mortgage interest statements (Form 1098) | ☐ Childcare expense information |
| | ☐ Any other tax-related documents |

2 Group Similar Documents Together

Sort your documents by category, not by date. We recommend these three groups:

Income Documents

- W-2s
- 1099s
- K-1s
- Social Security statements

Deductions & Credits

- Mortgage interest
- Property taxes
- Charitable contributions
- Medical expenses
- Education expenses

Clergy-Specific

- Housing allowance information
- Housing expense records
- Business mileage logs
- Ministry-related expenses

3 Review for Completeness

Before uploading, confirm that:

- ☐ All pages of multi-page statements are included
- ☐ Documents are clear and readable
- ☐ Forms show your full name and the tax year
- ☐ No documents are duplicated
- ☐ Any tax notices you received during the year are included

4 Combine Related Documents

Whenever possible, combine related documents into a single PDF. For example:

- All W-2 forms together
- All charitable contribution records together
- All housing allowance and clergy expense documentation together

*Fewer, well-labeled files let our team review your information more efficiently. Try a simple naming pattern with the tax year, document type and source — for example, **2026_W-2_FirstChurch.pdf** or **2026_Housing_Expenses.pdf**.*

5 Remove Unnecessary Documents

There is no need to upload:

- Blank pages
 - Duplicate copies
 - Documents unrelated to your tax return
 - Prior-year documents, unless we specifically request them
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6 Upload Through Your Secure Portal

Once your documents are organized:

1. Log in to your secure client portal.
2. Upload your files to the appropriate tax year folder.
3. Confirm that all files uploaded successfully.
4. Let our office know about any special circumstances or additional information we should be aware of.

Scanning & Photo Tips

- Scan to PDF when you can; photos are fine if clear
- Lay documents flat in good, even lighting
- Keep all four corners and edges in the frame
- Avoid password-protected or zipped files
- Check that small print and numbers are legible

Often-Missed Clergy Items

- Church resolution designating your housing allowance
- Estimated tax payments (dates and amounts)
- Copy of approved Form 4361, if exempt from Social Security
- Health coverage forms (1095-A, if applicable)
- HSA forms (1099-SA and 5498-SA)

A Final Tip

A well-organized document package lets us start your return sooner and focus on what matters most: accurate tax preparation, proactive guidance, and exceptional service throughout the year.

Thank you for helping us make your tax filing experience smooth, complete, and secure.