

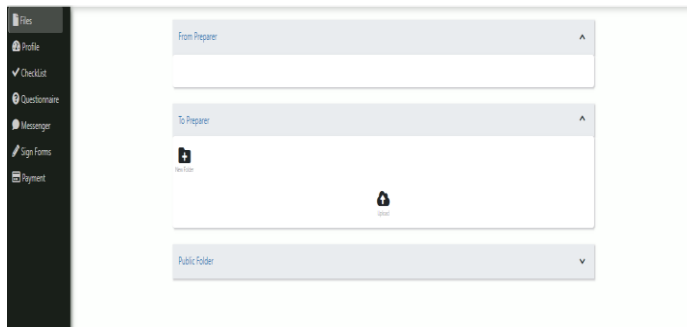


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## Document Delivery Options

### Secure File Pro Portal

**Client Portal:** Once a client portal account is set up for you, an email is generated. You will be prompted to create a password and log in to your account.



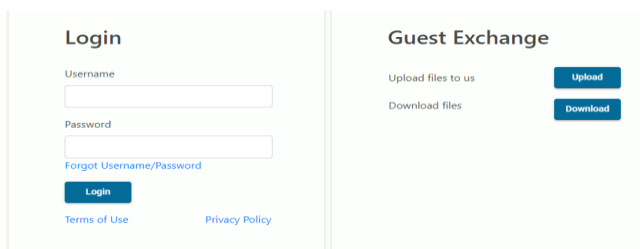
**Profile:** Verify your profile information for accuracy. Update any information as needed.

**Messenger:** List the forms you are sending. Include any comments or questions you might have in the message pane at the top of the screen.

**Files:** Upload your tax documents. Click the Upload button. Select the files you want to send. Click Upload Files to send.

**Guest Exchange:** This is a convenient, safe method to send your documents. It includes messaging and is an alternative to email. No login account or password is required.

Request an "Invite" to be sent to your email. Your invite will include a direct link to our Guest Exchange.



No need to login. Just click the Upload button on the right side of the screen.

Enter your name, email, and type a list of the documents you are sending and any comments or questions you might have in the message pane.

Select the files you want to send and click the Upload button.

### **Fax-Off**

Prepare a cover sheet that includes your name, address, phone number, email address, and a list of documents you are faxing.

Include a copy of your current driver's license and any completed questionnaires that we sent you with your tax documents. If you are anticipating a refund, include a copy of a voided check for bank account verification.

Fax to 717-590-5158. Before sending, verify that you have entered the correct phone number because you are including confidential information.

### **Copy & Mail**

Photocopy your tax documents before mailing them. Include a copy of your current driver's license, your contact information, and any completed questionnaires we sent you. If you are anticipating a refund and would like direct deposit, provide a voided check for bank account verification.

Our mailing address is 219 East Main Street, #207 Mechanicsburg, PA. 17055.

### **In Person Drop Off**

We will be closely monitoring the PA. Department of Health requirements and recommendations during this unprecedented time. Based on this information, In Person Drop Offs may be limited at our discretion. We would encourage you to check our website for availability updates.

- Drop & Go
- Curbside Pick Up

As a COVID precaution we ask all visitors to our office to wear a mask covering both nose and mouth prior to entering the office building. If you do not have a mask, we will be happy to provide you one. Please practice social distancing while here as a courtesy to the other businesses inside Frankeberger Place.

*Suggestion: If more than one member of your family comes to our office for tax preparation, designate one person to drop off everyone's tax documents.*