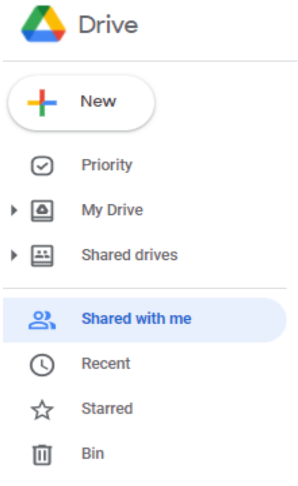
TAX & BOOKKEEPING

Client Information & Document Sharing Instructions

NOTE: *All information and files are to be gathered and shared in **Google Drive** via a private folder shared from JE Tax & Bookkeeping. Please do not send files over text/email as these methods are not secure.*

Access Shared Google Drive Folder

1. Log in to your [Google Drive Account]
2. Select "Shared with me" from the menu on the left side of the Drive home page



3. Find and select the folder named: "JE Tax & Bookkeeping - *Your Name* - Shared Folder"

OR

Search for "JE Tax & Bookkeeping - *Your Name* - Shared Folder" in the search box at the top of the Drive home page.

Once in your Shared Google Drive Folder

4. Open Folder for the "*Appropriate Tax Year"* (ie. 2022)
5. Open Google Sheet titled "Personal Tax Data Spreadsheet - *Your Name - Tax Year"*
6. Fill in required information fields on "Personal Information" Tab
7. Navigate to any other tabs present along the bottom of the Google Sheet, filling in required information fields in each (your tabs will be personalized based on the information provided during the Initial Client Consultation).
8. In the "*Appropriate Tax Year"* folder, upload all T-slips and any other supporting documents listed in the "Personal Information" tab.
9. [Notify Julianna] once you have completed filling in the Google Sheet and uploading any relevant supporting documents.