



Individual Tax Organizer

New Clients

Once you schedule an appointment online, we will create a Client Portal account for you and we will also create an online organizer for you to complete online prior to your appointment.

If you want to stay home, we can complete your taxes virtually...

To Get Started:

- Click the "Client Signup/Login" button at the top of our website
- Click "Sign Up"
- Select "Tax Preparation" when prompted

This process will automatically create an Individual Tax Organizer for you!

Existing Clients

To Get Started:

- Click the "Client Signup/Login" button at the top of our website
- Enter your email address and password (you already have access!)
If you forgot your password, click "Forgot Password?"

We will automatically create an organizer for you in January, prior to the start of tax season.