

## **Intuit LINK**

### **How to sign up, use and the benefits of using this a portal**

We will send you an invitation email to sign up for Intuit, hit the accept button in the email and create a password to create your account. After this is completed, it will take you into your Intuit Link portal. If you have used your email with an Intuit product in the past (i.e., QuickBooks), the system will be looking for that log in information when you are accepting the invite. If you don't remember that log in and password, we've found it is best to use a new email to sign up.

After this set up process the system will take you right to your portal. Your organizer for the current year will be in a list of "requests" giving you an opportunity to upload your documents to each request and add notes to us if you'd like. In addition, you will be able to sign our engagement letter by typing in your and your spouses (if applicable) name and hitting accept.

Some of the benefits to using Intuit Link are:

- It is a secure place for all your tax information, including a PDF copy of your tax return. Everything is saved in one spot that you can access at any time. Eliminating the need to keep paper documents.
- All prior year's data will be at your fingertips.
- You can use your smart phone to access your account, take a picture of your documents and upload them.
- You can scan in any documents from your computer.
- Save you time and gas coming to the office to drop off your data then coming back again to pick up a copy of the return.