Alliance Financial & Income Tax

Helping You Keep More Of Your Hard-Earned Money

Delivery of Documents

Schedule an appointment- If you are a *new* client, or if you feel that you need an in-person consultation about significant situations or changes from the prior year. Please do not schedule this appointment until you have all your supporting documents gathered and ready to bring with you. Please be aware that appointments during tax season are for preparation of returns and not tax planning. Planning appointments can be booked from May to end of the year.

Drop Off Tax Support @ Front Desk- if you do not require an appointment, please bring completed Client Intake Form and ALL supporting documents to our office or drop box.

MAIL- Please complete the Client Intake Forms and mail with ALL supporting documents to
> Alliance Financial & Income Tax
> 807 NW Vesper St.
> Blue Springs, MO 64015

Online Secure Portal-TaxDome- Every client has a portal available to upload documents. Use as few pdf's as possible-we do not need you to label each document or need accompany receipts to organizers for self-employed or rental property purchases. A completed and uploaded organizer is fine. Multiple pdf or jpg files are time consuming to print and organize and therefore will be billed by time.

> How to upload using your PC:
> - Scan all your tax support documents onto your PC into 1 pdf file (per year) and save to your DESKTOP
> - Login TaxDome > Go to **Documents** section > Chose **Your Documents**, then click **NEW** and upload files
> - You will see a tree of folders with tax years, drag and drop file to TD folder of your choice or click the document upload button to the right of the TaxDome folder then locate the file on your computer to select it.
> - If you need to add folders, click NEW Folder and chose which tax year
> - Click **UPLOAD** to add these documents to your account. They are not loaded until you UPLOAD them.

If you need to take a picture of the document using your mobile phone, uploading using the TaxDome mobile app will be best option for you. The app allows you to take a snapshot of your document and continue to add more documents creating just 1 pdf to upload at the end. This is the best option to minimize the number of files uploaded to your account.

> How to upload using your TaxDome app: How to take and Upload pictures
> - Download Tax Dome app from your App store or Google Play
> - Our office URL is **afitonline**
> - Sign in with the same email and login information from your computer
> - Mobile app you must create a **PIN** for security reasons
> - From the HOME screen, go to top left 3 lines we call "hamburger"
> - Go to **Documents** > **NEW**> **Scan Document**. Now your camera will open (give access)
> - Take a clear and full pic of your tax document> a thumbnail will appear in the lower right but the camera stays open to take another pic, and another and so on. You will notice the number increases per the number of documents you have in the set of pictures. Once you are done, click the thumbnail in the lower right to review what you have taken. You can scroll through each pic to verify it is clear or if it needs to be cropped using the cropping icon at the top. If you need to add more, click the **+** to continue adding, or if these are complete, click **UPLOAD.**
> - You will see the tree of folders, select the appropriate folder for this tax year or chose the 3 dots to create a new folder and click **SAVE**