



Secure Vault Upload Instructions

Please read this entire document prior to calling or emailing.
715-455-1968 or vault@teamhoff.com

Below are specific items that we will need to complete your return.

NEW CLIENT

1. A copy of your last **TWO year's tax return**
2. If you have a business, a **current depreciation schedule**
3. Your **current tax documents**
4. Copies of **driver's license**
5. **Names, dates of birth and soc sec # for all household members**
6. **Voided check** for direct deposit of refund (*if there is one*)
7. **Completed Tax Organizer (Website -> Forms -> 2023 Tax Organizer)**
8. Current contact info: **phone number and email address**

EXISTING CLIENT

1. If you have a business, a **current depreciation schedule**
2. Your **current tax documents**
3. **Names, dates of birth and soc sec # for any new household members**
4. **Voided check** for direct deposit of refund (*if there is one*)
5. **Completed Tax Organizer**
6. Updated contact info: **phone number and email address**

IMPORTANT: Please scan all of these items into **one PDF** file prior to starting the following instructions. The most user-friendly app to achieve this is 'TurboScan'.

Using the Secure Vault for NEW CLIENTS:

1. Go to www.teamhoff.com/forms
2. Click on **'Send Files Securely'**
3. Under **'Guest Exchange'** (*right side of screen*) click on 'Upload'
4. Enter your name, email address, and type a message to us that includes your phone number.
5. Click on **'select'** on the right side of the screen. This is where you will attach your PDF with the items we need to complete your tax return (*again, make sure this is one PDF file*).
6. Click **'Upload'**.
7. A pop-up window will appear that says **'Are you sure you want to upload file to Hoff?'**
Click **'Upload'** in the bottom right corner of the pop-up.

Using the Secure Vault for EXISTING CLIENTS:

1. Go to www.teamhoff.com/forms
2. Click on **'Send Files Securely'**
3. Type in your username and password and click 'Sign In'
(*if you forgot it, click on [forgot username/password](#)*)
4. Click 'Upload' and choose the PDF with your files, then click Upload File(s).
Do not click 'exit' until it says 100%

Once your PDF file is uploaded, it will go to our tax preparers. If they have any questions, they will reach out to you via the email address you provided. Please make sure this is an email address you check regularly. Sometimes, our emails go to junk/spam mail. Please make sure you are checking that as well.