SMOOTH SAILING WHEN USING SMARTVAULT

SmartVault is a great tool for sending your Tax Documents to Trish. It minimizes the paper in our cozy space and makes us all feel great about the trees we are saving.

Here are five helpful pro-tips; whether you are already a faithful SmartVault user or for those courageous first time users who are considering trying SmartVault this year.

- Upload your documents using a PDF Format, only!
  JPEG, PNG, DOCX and other formats don't usually work;
  (**Please** check to make sure your documents open)

- Make sure your documents are legible! (no blurry, blank or so-so docs, please!)

  Let's keep Trish using kind words!

- Make sure your documents are right side up!

- Title your documents whenever possible (ex: W2, 1099-int, etc.)!

- Try uploading using one continuous scan (instead of individual documents)