



\*PLEASE DO NOT REPLY TO THIS EMAIL NOTIFICATION\*

CLIENT NAME

Thank you for working with Edelstein & Company LLP this tax season. We are excited to offer a guided process to complete your tax organizer online using SafeSend Organizers. This will allow you to complete your organizer electronically and upload the source documents for faster, secure processing.

Please click on the link below to access our electronic processing center and get started!

This is on the Q&A / FAQ page.

- 1.This email will contain a safe link for you to access your tax organizer. You will be prompted to enter the last four digits of your SSN to review your organizer.
- 2.Then, SafeSend will email you an access code to further verify your identity. Check your spam or junk folders if you don't see it in your inbox. You must enter the code within 10 minutes of receipt. If the code isn't entered within 10 minutes, you can request another.
- 3.Upload your documents to the corresponding section of your organizer using the camera on your mobile phone or tablet, or upload files directly from your desktop. After completing our required signature documents and these custom questions, Use the left page bookmarks or the Blue Arrows on the bottom middle of the page to page through and complete the organizer or click REVIEW MISSING INFORMATION, so you can upload documentation.
- 4.You can flag your organizer as complete, and Edelstein will be automatically notified; we will begin the process of preparing your tax return.
- 5.If additional tax documents come in after submitting your organizer, you can still upload them with the rest of your documents.
- 6.Click on the Paperclip to upload documents using the left side page panel, or open the link on your phone to use the camera phone to upload photos.

If you have any questions, please contact 617-227-6161 or email [TAXSUPPORT@edelsteincpa.com](mailto:TAXSUPPORT@edelsteincpa.com)

Access Your Docs: <https://organizer-taxpayer.safesendreturns.com/r3auumkvaxgmj28ru4p9hm8k17q0h000>