What to Submit and How to Submit it

Organizers

Attached are two options to help you prepare your documents for submission

1. Comprehensive Tax Organizer—a thorough questionnaire to help you identify and report all your tax-related events for the year, including all possible credits
2. 2025 Tax Checklist—a simple checklist to help you organize your tax documents

If you filed Schedule C or E last year, you will find a worksheet in your SmartVault reflecting those numbers. Please either use the worksheet to complete the amounts for tax year 2025 or provide P&L from Quickbooks.

If you filed Schedule A, Business Use of Home, and/or Vehicle Expense Forms last year, worksheets with those numbers are available upon request. Send an email to tax@fsm-inc.com or text 303-988-1411 with your specific request.

If any of your contact information has changed since you filed last, please be sure to include this info with your tax documents (e.g. home or mailing address, email address, mobile phone numbers, etc.). If you renewed your driver's license this year, please include a photo copy of your new license with your tax documents—we will need it in order to file your state return. Tip: check the expiration date of your license; if it expires prior to April 15, 2026, please be sure to stay on top of your renewal and provide a copy of your new license so as not to delay the filing of your return.

Next, you will need to SUBMIT YOUR TAX DOCUMENTATION by the deadline stated in your email via your preferred method from the options below:

Digital Submission Options

1. **Scan and Upload** your documents to your TY25 Client Source Documents folder at www.my.smartvault.com
   - See the "How to Use SmartVault" instruction sheet attached for more information
   - Accepted file types include .pdf, images, .docx, .xlsx, or similar
   - We cannot access .heic, .tiff, website links (.html), .pages, google sheets, or similar
   - If your document is password protected, please provide your password
2. **Email**–call 303-988-1411 or email tax@fsm-inc.com to request an encrypted email be sent to you for secure reply.

We recommend you DO NOT text or email your information directly as this is less secure and vulnerable to hackers.

Paper Submission Options

For All Paper Submissions: To prepare your doucments for scanning, please remove all envelopes, staples, and filler documentation prior to submission. Please include a summary sheet totaling your receipts for any medical expenses or charitable contributions. This will help you avoid any additional processing or bookkeeping charges.

1. **Send your packet via mail**–COPIES ARE PREFERRED. Copies will be scanned to your SmartVault and then promptly shredded for your security.

   If you send originals in the mail, they will be returned to you via regular USPS mail unless you specifically indicate that you want them shredded or you want to come pick them up.
2. **Drop your packet off at the office** for processing–copies will be scanned and shredded.

   If you drop off originals, you will be asked to pick up your documents as soon as they have been processed.
3. **Scan-While-Wait Service**–bring your documents to the office for same-day scanning and take them home with you when completed. You can call 303-988-1411 to schedule a 30-minute Scan-While-Wait appointment, or you can drop in any time during open office hours, though wait time is subject to volume.
4. **After hours Black Box**–checked daily

   Please provide COPIES of your information if you can–these will be scanned and shredded for your protection.

   Original documents will be scanned. You will be contacted to make arrangements for pick up or mail.

Text “GO”

Once you have submitted all of your information, give us the green light to begin working on your return by texting “GO” or calling the front desk. The number for both is 303-988-1411. Someone from the tax department will be in touch if there’s any missing information needed to complete your return.

If you have everything together but know that you are WAITING for that one document that always arrives late in the season, please gather and submit everything else. Text “GO” and let us know what you’re waiting for. We will get to work on the rest and note the delayed document. If you believe an extension will be necessary, please refer to the Extension Information document for further details.

When your return is ready to review, your Tax Preparer will reach out to you to discuss results and next steps.

Expecting a refund?
The sooner you file, the sooner you’ll get your refund back.

Expecting to Pay?
File early—pay any time up until **April 15, 2026** [illegible].

Note: The IRS is no longer accepting checks for tax payments or issuing checks for refunds.
We will assist you in setting up auto payments / refunds through your bank account.

Need some help determining what information is required to complete your tax return?
Or think you might need to file an extension this year?
See the attached documents for helpful details to make your experience easier and faster.