



**SmartVault Access & Intuit Link Tax Questionnaire
February 2022**

Dear Friends,

To provide you with a safe and secure way to share files with our firm, we continue to partner with **SmartVault**, an award-winning online document storage and secure file sharing solution. You may use this portal to securely store, upload and download documents all year long.

Your data is always backed up, so the chance of a lost file or corruption is minimal. Nonetheless, given that your files are important for tax and accounting matters, we recommend that you keep copies of documents in your own tax files in accordance with our Document Retention Guidelines attached to our engagement letter. We also only need summaries of many transactions, so we strongly recommend that you keep receipts, statements, logs and other supporting documents in your own tax files.

You may access your SmartVault portal at <https://www.smartvault.com/> and clicking "Log In" at the top right-hand corner of the screen. From there, you can input your email address associated with your SmartVault account and your password that you set up last tax season. If you do not recall your password, click "Can't Sign In?" at the bottom of the blue sign in box. This will prompt you to input your email address to be sent a link to update your password. If you are new to our firm, you should have received an invitation to register for your SmartVault account. If you have not received this email or are not sure what email is associated with your SmartVault account, please contact Chandler Karpowich at chandler@bga-cpas.com.

After login, you should see a 2021 folder with a Source Documents subfolder – this is where you may store and upload any 2021 documents. We will sort, copy and may rename, files in this folder. You will also see access to various other folders including some handy information available only to our clients.

In addition to SmartVault, we also utilize **Intuit Link** as an easy way for you to answer questions within our Tax Organizer and to upload relevant documents. The 2021 Tax Organizer is now available for you via Intuit Link and our website <https://www.bga-cpas.com/clienttaxorganizer> to provide us relevant information. We also use templates and questionnaires to gather information about a specific topic. Intuit Link refers you to these templates and questionnaires when they are requested. The templates and questionnaires are available on our website, and the password to access them is BGA2021.

Kindly note that supporting documents need only be uploaded to SmartVault OR Intuit Link, not both. Intuit Link can be accessed directly at <https://link.intuit.com/login/#/signin>. **Please note that there is only one log-in to access your Organizer. Usually, the primary taxpayer will receive the Intuit Link email, unless you have previously contacted us to request your spouse be the main contact for Intuit Link instead.** Persons filing a joint tax return may share the username and password to Intuit Link and should answer the questions jointly. The primary taxpayer is the first name listed on your jointly filed tax return. The spouse's name appears as the second name on your jointly filed return. Please respond to the Organizer questions for taxpayer and spouse consistent with how your names appear on your jointly filed tax return.



We are always here to help, so feel free to contact us via email or phone with questions or feedback.

Sincerely,

Your Team at Brenner Global Associates
281-360-2800
info@bga-cpas.com

Other 2021 e-mailings from Brenner Global Associates:

- Welcome Letter to 2021 Individual Tax Return Preparation Season
- Year End Reminders for Businesses: Accounting, Bookkeeping, Taxes, W-2 and 1099 Reporting
- Form 7216
- Request for Power of Attorney