



STREAMLINE YOUR TAX SEASON

JOIN OUR SECURE TAX PORTAL!

As part of our commitment to providing exceptional service, we're thrilled to introduce you to the **Tax & Accounting Solutions Tax Portal!** This secure, user-friendly platform is designed to simplify your tax process, save you time, and ensure seamless communication.

Why Use Our Tax Portal?

Streamlined Communication: All tax return-related messages, documents, and updates are centralized in one secure location for easy access and efficiency.

Easy Document Uploads: Skip the hassle of paper – upload documents directly to the portal, ensuring everything stays organized. Plus, enjoy access to the previous three years of documents you've submitted, keeping your records centralized and accessible.

Guided Preparation: We'll remind you of the documents and information you provided last year, taking the guesswork out of what's needed this time.

Tailored Questionnaire: Answer only the questions directly related to your tax situation – no more generalized, irrelevant questions.

Electronically sign & pay: Sign your tax returns and make payments electronically right within the portal—no printing, scanning, or mailing needed. This means faster submission and quicker processing.

Secure and Convenient: Easy 24/7 access to your tax information in a secure, AICPA SOC 2-certified environment with industry-standard encryption to keep your data safe.

Flexibility of Use: If scanning all your documents isn't possible, you can still take advantage of the portal for streamlined communication, a personalized questionnaire and progress tracking while bringing your documents to our office.

Ready to Join?

We'll be sending out invite links to your email address we have on file. If your link expires or you don't receive the invite, simply contact our office to request a new link.

Prefer Paper? No Problem!

We understand that some clients may prefer traditional methods. If you'd like to stick with paper, simply email us at contact@taxsolutions-nm.com. We'll provide you with a printable questionnaire and engagement letter to get started.