

Folder Sharing Instructions

These instructions are for creating a shared folder in **Google Drive** for permanent two-way sharing with me, your accountant. This will provide a place for you to deposit and store documents that I will be able to see, as well as a place for me to deposit your completed tax returns.

1. Locate your Google Drive. From your Gmail home screen click on the Google apps link, then select Drive.
2. Click New, then Folder.
3. Name your folder "Smith Tax Portal" using your own name, of course.
4. Share this folder with me at pgbarnard@gmail.com and give me **editor** rights to the folder.
5. **Please use PDF**, not jpeg other formats for the documents you place in the folder.
6. Once you have gathered all of your documents into your folder, you'll need to let me know it's there. This is the hazard, that in the hurry of tax season I'll never know that you've sent your things. So please let me know.

Remember where to find your folder; bookmark it. We will add to it every year and over time your documents will accumulate. You will be able to find everything in one place whenever you need copies of things for bank loans, FASFA, etc.