

# Delivery of Documents

**Schedule an appointment**- If you are a *new* client, or if you feel that you need an in-person consultation about significant situations or changes from the prior year. Please be aware that appointments during tax season are for preparation of returns and not tax planning.

**Drop Off Tax Support @ Front Desk**- if you do not require an appointment, please bring completed Client Intake Form and ALL supporting documents to our offices drop box right inside door to the right.

**MAIL**- Please complete the Client Intake Forms and mail with copies (Please do not mail originals!) of ALL supporting documents to

DeGroot Tax Prep & Accounting  
1123 7th Street  
Harlan IA 51537

**Coming in Jan 2024**

**Online Secure Portal** Every client has a portal available to upload documents. Use as few pdf's as possible-we do not need you to label each document or need accompany receipts to organizers for self-employed or rental property purchases. A completed and uploaded organizer is fine. Multiple pdf or jpg files are time consuming to print and organize and therefore will be billed by time.