

# **Smart Vault Access & Intuit Link Questionnaire** **Supplemental Information** **January 2024**

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/>, then click “Log In” at the top right-hand corner of the screen.  From there, you will 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 Beth at [Beth@bga-cpas.com](mailto:Beth@bga-cpas.com), or Carri-Ann at [Carri@bga-cpas.com](mailto:Carri@bga-cpas.com).

After login, you will see the option to view your documents or upload them. To upload, be sure to select the  Source Documents subfolder – this is where you may store and upload any 2023 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. Should you choose to upload directly to SmartVault, please send Beth or Carri-Ann an email to make them aware that documents have been added. From the Home screen, when you click “view your documents”, Smart Vault will take you to your vault. Click on your name and then the tax year you’d like to view. Once inside your vault, you will see both your Source Documents file and the Tax Return file. Upon completion, your returns will be printed as a PDF to this Tax Return file. In addition, signature pages and e-file acceptance letters will also be added to this file, for your convenience.  
  
In addition to SmartVault, we also use **Intuit Link** as an easy way for you to answer questions within our Tax Organizer online, to upload relevant documents and for us to send you documents.  For returning clients and most new clients, you will receive an invitation to Intuit Link via email.  If you have not already signed-in previously, you will need to create a username and password.

The spreadsheet version of our 2023 Tax Organizer is now available for you via our website <https://www.bga-cpas.com/clienttaxorganizer>.  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 **BGA2023.**   
  
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 Tax 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 Tax Organizer questions for taxpayer and spouse consistent with how your names appear on your jointly filed tax return.

One more word about Intuit Link for returning clients.  There is a box at the top of the main Intuit Link screen that allows toggling between years.  Referring to prior year details may be helpful.  Please ensure to you use the 2023 tax year for the 2023 Tax Organizer and for uploading your 2023 tax documents.  Please do not upload 2023 documents to prior years as we may not see them.   
  
We are always here to help, so feel free to contact us via email or phone with questions or feedback.

Sincerely,  
The Team at Brenner Global Associates, LLC  
281-360-2800  
info@bga-cpas.com   
Click on the buttons below for access directly to the website:

|  |  |
| --- | --- |
| |  | | --- | | [**SmartVault**](https://www.smartvault.com/) | |

|  |  |
| --- | --- |
| |  | | --- | | [**Intuit Link**](https://link.intuit.com/login/#/signin) | |

|  |  |
| --- | --- |
| |  | | --- | | [**2023 Excel Organizer (BGA Website)**](https://www.bga-cpas.com/clienttaxorganizer) | |