



Fillable PDF Instructions

Many of our forms are available in Fillable PDF format on our website. Follow these instructions to submit your information to us electronically.

1. Find the form you are looking for on our website, www.KevinShawCPA.com. Most forms are located under the "Resources" tab and then "Client Forms". Any PDF fillable form will have FILLABLE in the title. Click on the appropriate form to open the link.
2. Click "file", then "save as" and save the file to your desktop or wherever you would like the file stored.
3. Complete the form. You should be able to save your work and go back and make changes. Please note: if you save using "file" then "save as", it will ask you for the location and file name where you would like it saved. Make sure it is saved in the correct location with the correct name (it is easy to overlook this and create two files).
4. If you have a version of Adobe that allows you to print PDF's, print your completed form as a PDF. When you do this, it will take away the fillable properties. Save the file where you can easily access it again. That way, when you send us the file, it will no longer be fillable. If not, you do not need to complete this step.
5. Now you are ready to send us your form by using our secure client dropbox. You can access the CPA SafeMail Dropbox from the home page of our website. Click on "Client Dropbox". Log in by using your email address and password. Select SJ Meyer as the recipient and then click on the "Attach File" link to upload your file. Click on the "Browse" tab to select the file from your computer. Enter in your email address, first and last name and then click on the "Send Files" tab. When your file uploads a green "Upload Successful" message will appear and SJ will automatically be notified that your file has been uploaded.
6. If your information does not contain any sensitive private information like social security numbers, you can email your file to Sj@kevinshawcopa.com. Keep in mind, email is not a secure way to transfer information. CPSA SafeMail is the most secure way to send information to us.
7. Thank you for using our electronic document system.

TIPS: Download the latest version of Adobe Reader at www.adobe.com
Having trouble with Internet Explorer? Try a different web browser such as Firefox or Google Chrome.