SHAW & ASSOCIATES
CPAs & FINANCIAL ADVISORS

Fillable Questionnaire Instructions

Our tax questionnaires are available in Fillable PDF format on our website. Follow these instructions to submit your information to us electronically.

1. On our website, www.KevinShawCPA.com, you will be able to find the current year's tax questionnaire. Click on the "Resources" tab and then "Client Forms". The fillable questionnaires 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 questionnaire. 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. Click the "Submit" button in the upper right hand corner of the questionnaire. A "Send Form" screen will appear and you will need to fill in your email address, your full name, and then click the "Send" button. On the "Select Email Client" screen, choose either "Desktop" (ex. Outlook) or "Internet" (ex. Gmail). You will then receive an Outgoing Message Notification that the form has been sent. Double check your outgoing messages to confirm that the form was submitted.

5. Send an email to SJ at Sj@kevinshawcopa.com after the form has been submitted to notify her that the form was sent and confirm receipt.

6. 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 we browser such as Firefox or Google Chrome.