

HOW TO SECURELY GET YOUR TAXES DONE FROM HOME

Step 1

Email us at wickerfinancial@gmail.com. We will then send you an email with a link to upload your documents directly to our secure tax preparation software. Look for an email from: wickerfinancial@gmail.com <no-reply@securefilepro.com>.



Step 2

Click the link in the email to be sent to our secure file upload system. Your Pin Number will be '2020'. Create a password and access your account.



Step 3

Under the 'Files' tab on the far left, click 'Upload' to upload any documents you have scanned into your computer. If possible, the more documents you can include in one scan, the better. Refer to the provided checklist for what documents to upload.



If you are uploading from your mobile device, simply click upload and capture a complete image of your documents.

Step 4

Sit back and relax. We will email any questions we have. Once completed, we will chat on the phone with you to review your return together. Signature and payments will be completed via DocuSign.



Contact us with any questions you may have. We look forward to getting your tax preparation done safely, securely, and stress free.

WICKER FINANCIAL SERVICES
TAX PREPARATION
wickerfinancial@gmail.com
715-688-4000

WHAT YOU WILL NEED

In Person, Drop Off, or Online Document Drop

Forms that show your Income

| | |
|--------------|---|
| W2 | Wages |
| W2G | Gambling Income |
| 1099 SSA | Social Security Statements |
| 1099 R | Retirement Statements |
| 1099 Misc | Miscellaneous Income |
| 1099 G | Government Income (Unemployment Income) |
| 1099 Div | Dividends Income |
| 1099 Int | Interest Income |
| 1099 SA | Health/ Medical Savings Distributions |
| RRB1099 R | Railroad retirement |
| Schedule K-1 | Income from a Business Partnership |

Forms that are used to calculate your Tax Liability

| | |
|-------------------------------|---|
| 1098 | Mortgage Interest Statement |
| Year End Statements | Retirement Contribution Statement (529 Contributions) |
| 1098 T | Tuition Statement |
| Real Estate Tax Bill | Property Tax Payment |
| Rent Certificate | Proof of Rent Payed |
| 1095C | Proof of Health Insurance |
| Invoice from Daycare Provider | Child Care Expenses |

Other Forms/Documents

Last two years of tax returns (if filed)
Driver's License/ State Issued ID
Dependent's SS Card
Closing Documents from Sale or Purchase of a House
Charitable Donation Receipts

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