

How to Upload your Tax Documents to the Hantz Group Family Office App

2021 Tax Season Edition



App Download

Before you begin this process, please ensure you have downloaded the app. You can download from the QR code or link below.

Apple

<https://apps.apple.com/us/app/hantz-group/id1473821963>



Android

<https://play.google.com/store/apps/details?id=com.hantzgroup.mobileap>

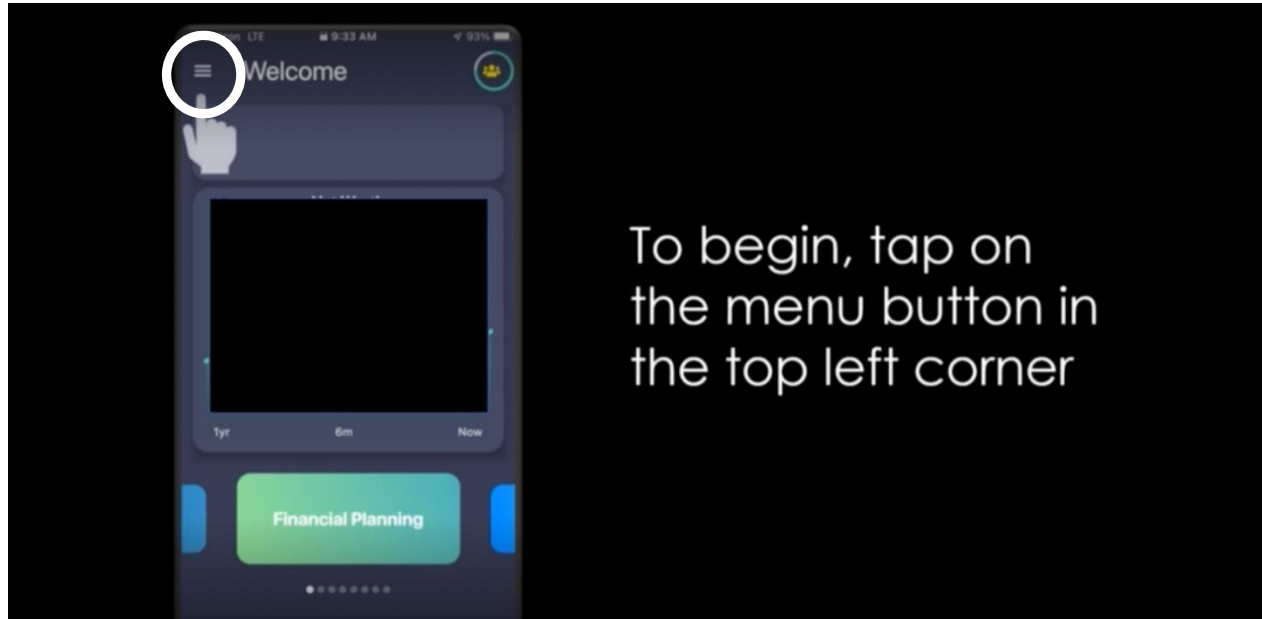


Upload Instructions

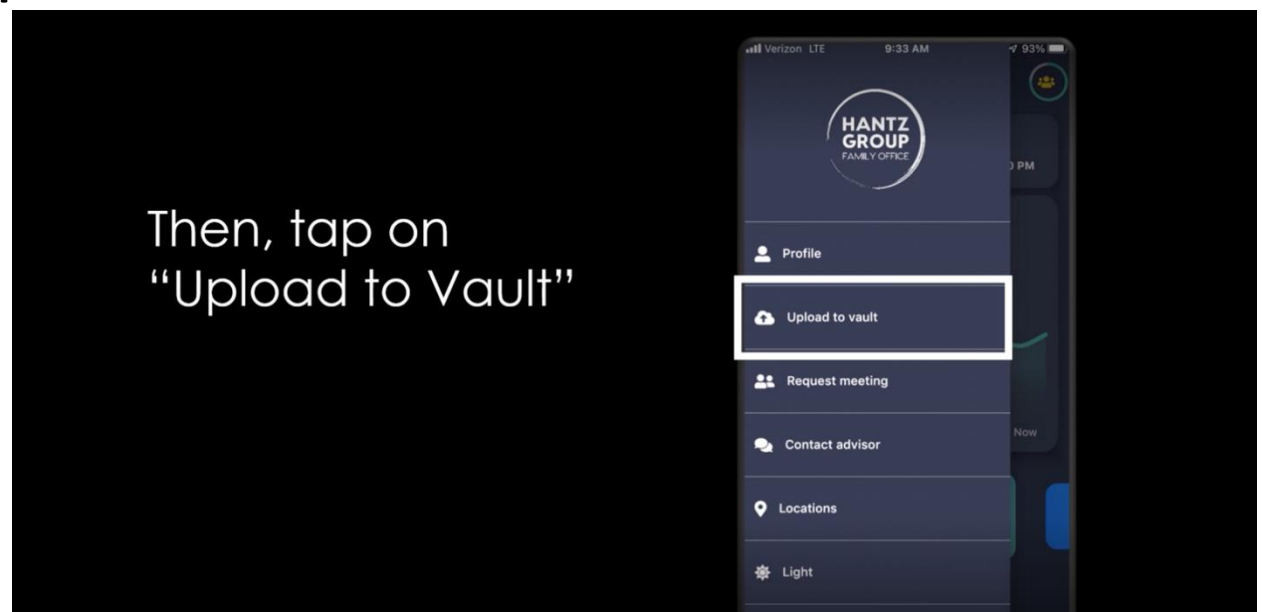
Applies to both Apple and Android

For any questions, please contact us at communications@hantzgroup.com or contact your tax specialist

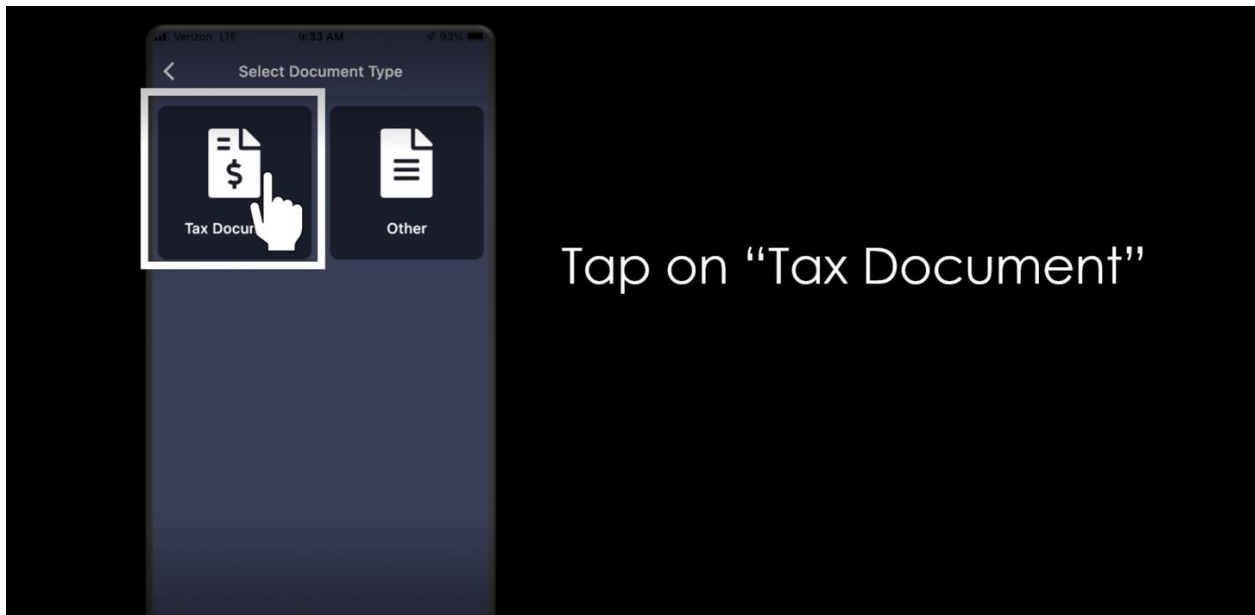
Step 1.



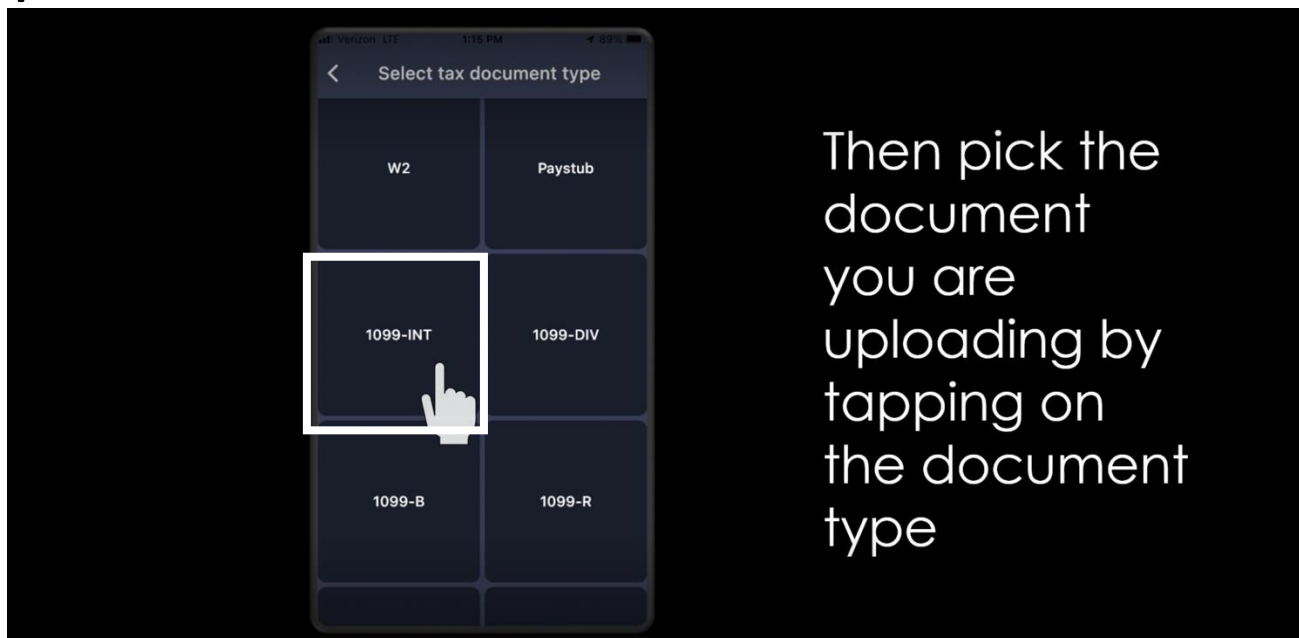
Step 2.



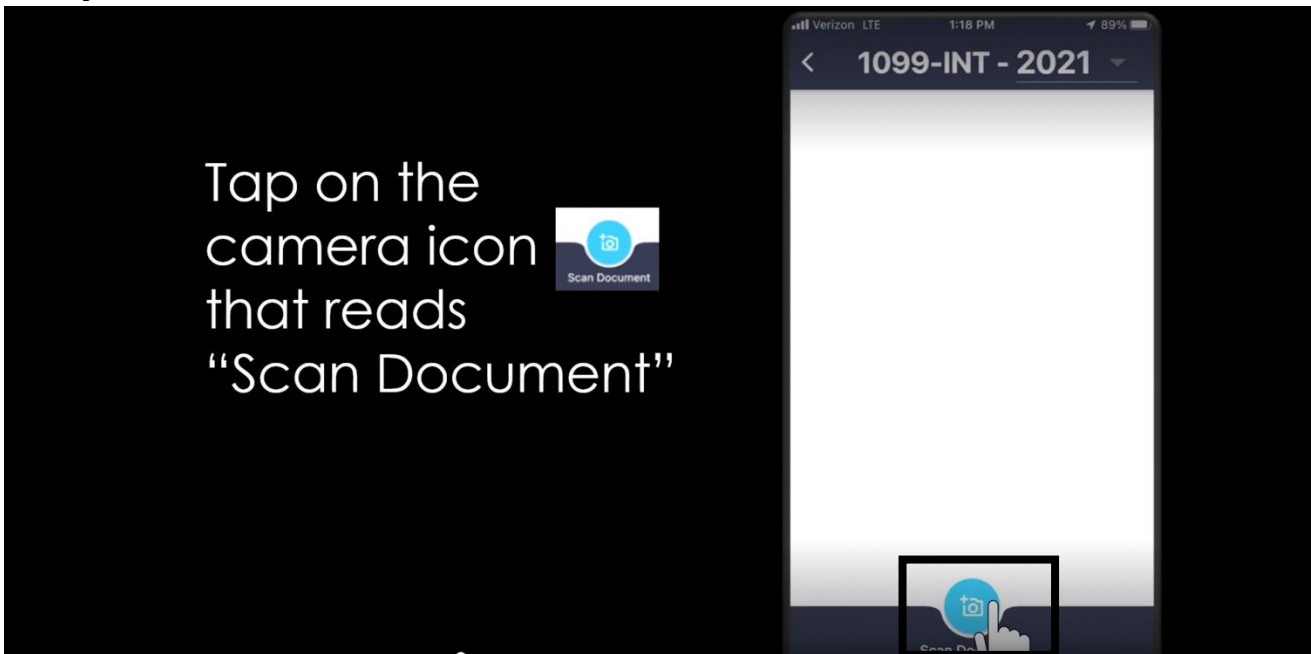
Step 3.



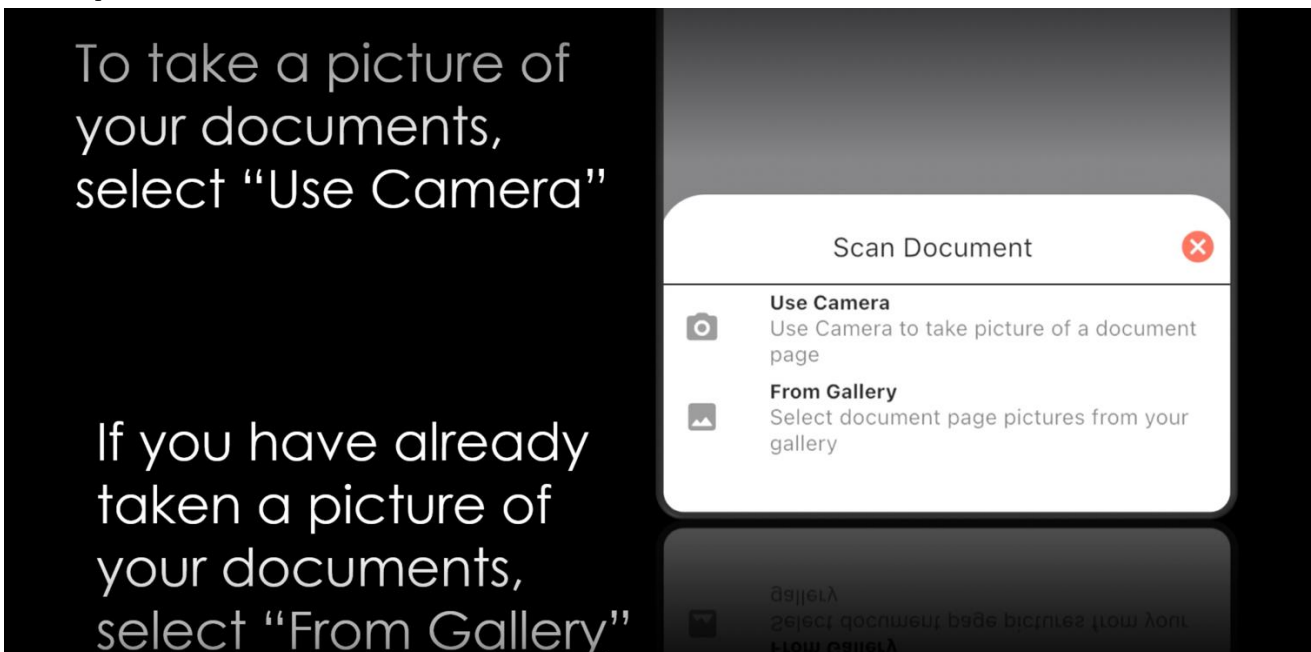
Step 4.



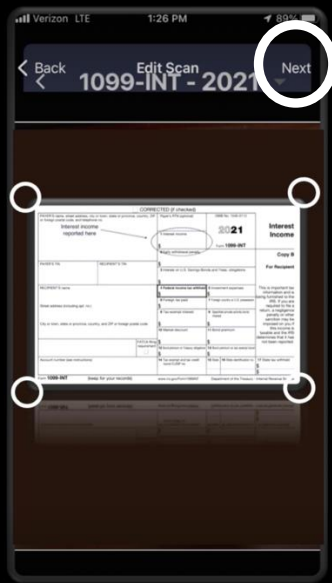
Step 5.



Step 6.



Step 7.



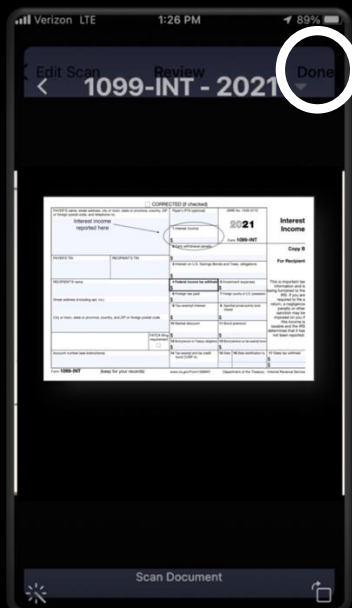
Put your document into the frame of the camera, and the app will automatically capture the image when it's ready

After the app has captured the image, tap "Next"

Tips:

- Use a background that has contrast with the document you're scanning
- Flatten any creases in the document

Step 8.



If everything looks correct, tap "Done" in the top right corner

Step 9.

The summary screen will show you the documents you've scanned as part of this upload

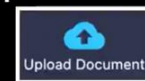


To add another page, click on the blue icon

Step 10.

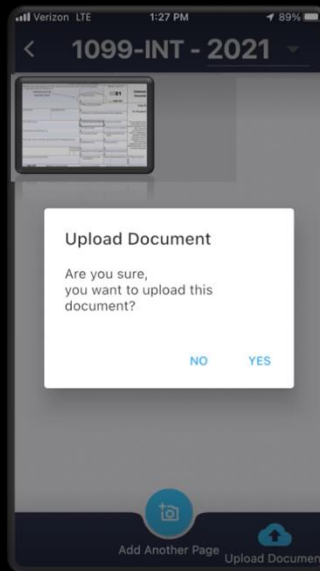


When you're done scanning the document(s), tap on the upload icon to send the document to your HantzGroup team



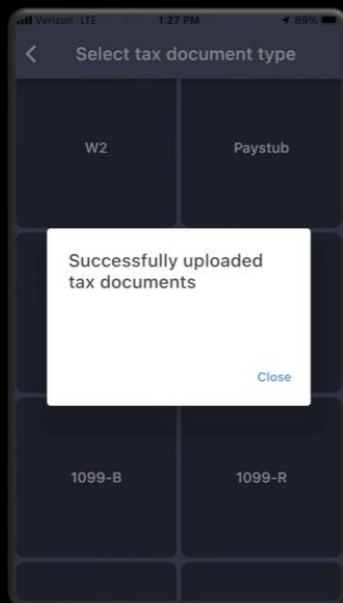
Step 11.

Confirm you're ready to upload the document...



Step 12.

When your documents have been successfully uploaded, you will receive a confirmation notification.



For any questions, please contact us at communications@hantzgroup.com or contact your tax specialist

Thank you!