

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

2022 Tax Season Edition



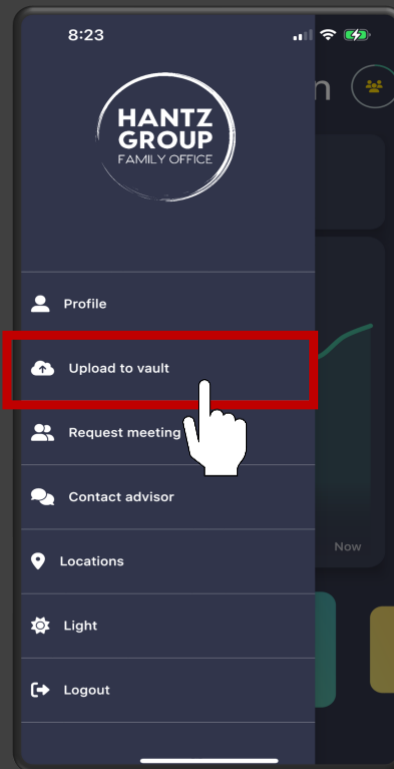
Step 1



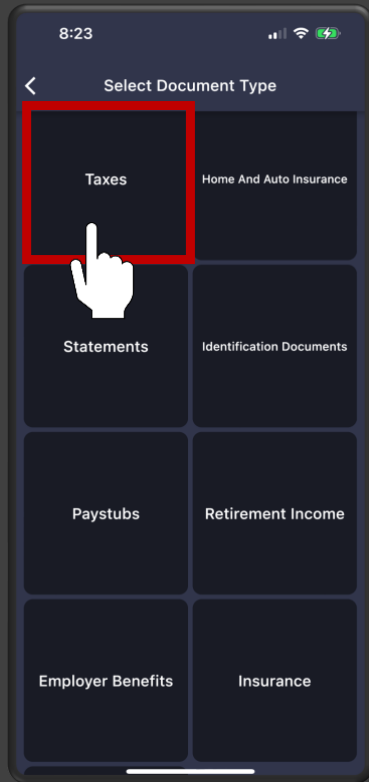
From the home screen,
click on the menu button
in the top left corner

Step 2

Tap on "Upload to
Vault"



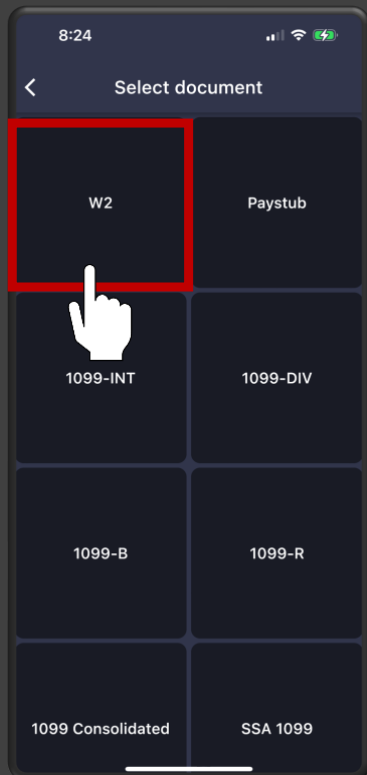
Step 3



This will navigate you to a screen where you must select the document type

Tap on "Taxes"

Step 4



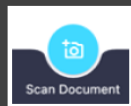
This will navigate you to the tax document upload section

Select the tax document type you are looking to upload

Step 5

A screen will appear for you to begin to scan documents for the specific tax document you selected

Tap on the camera icon that reads "Scan Document"



Step 6

A pop-up will ask you how you want to scan your document

To take a picture of your documents, select "Use Camera"

If you have already taken a picture of your documents, select "From Gallery"



Step 7



If you select “Use Camera” your phone camera will be ready to take a photo

Put your document into the blue square – the app will automatically capture the image when it’s ready

Tip: Placing documents on a dark background before taking any photos will improve legibility

Step 8



After the photo is taken, you will review the photo

If everything looks clear and correct, tap “Done”

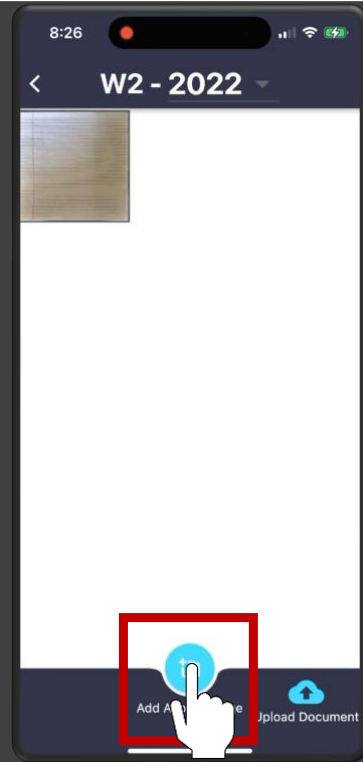
If not, tap “Retry” to take another photo.

Step 9

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

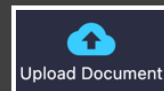
To add another page, click on "Add Another Page" and follow steps 6-8

Note: There is a 5-page maximum per upload.

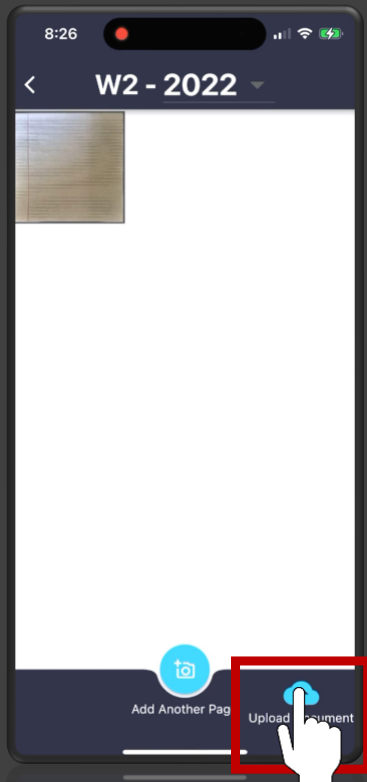


Step 10

When you're done scanning the document(s), tap the "Upload Documents" icon



Reminder: You *MUST* click "Upload Document" and follow the next step in order to add your documents to your Vault.

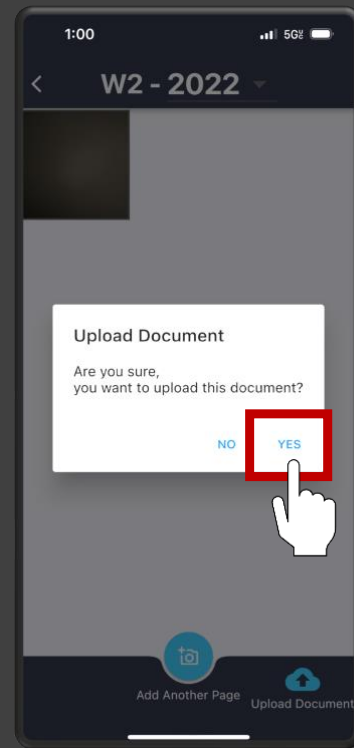


Step 11

You will have to confirm you want to upload the document(s)

If so, Click “Yes”
If not, Click “No”

Reminder: You MUST click “YES” in this step to complete the upload.

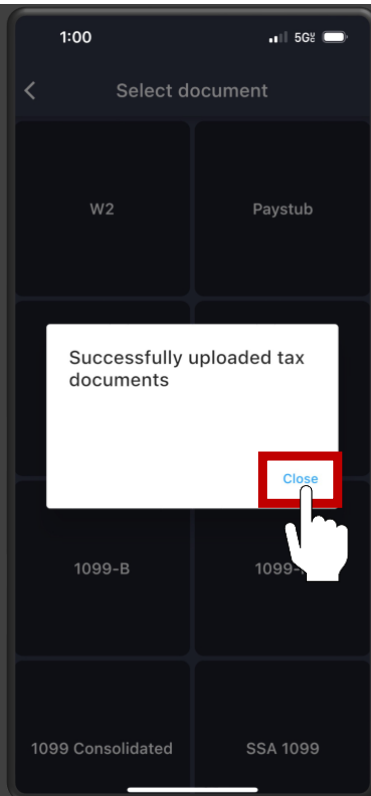


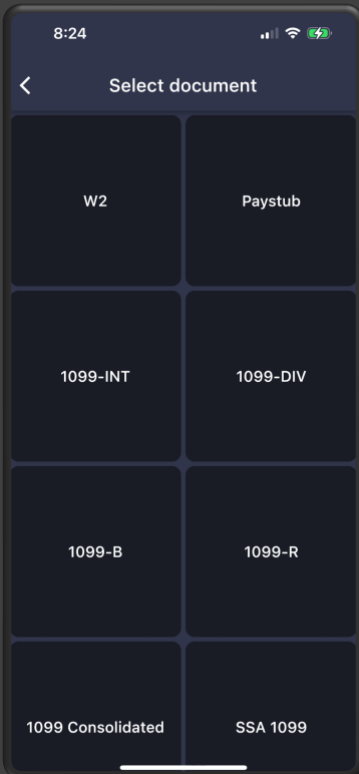
Step 12

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

Click “Close”

This will send upload your documents to your Vault





You will be redirected back to the “Select document” section under Taxes for 2022 to continue your uploads

Repeat steps 4-12 for all tax documents that you need to upload



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

Thank you!