Instructions for New Excel Organizers

Created to make the process of gathering your
tax information easier and more efficient

How to use these organizers

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1. Create a folder on your computer called **TAXES-202_**

2. Click on organizers: <u>Sheet1</u>, <u>Sheet2</u>, <u>Sheet3</u>, or <u>Sheet4</u>
and save each file in **TAXES-202_** folder.
Please click only on the sheets that you need.

Email or Upload your files to us 24 hours before appointment

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You may email your files to Juda Kallus at **Juda@judakallus.com**
and to **Steeven@judakallus.com**

Or upload your files to your CloudCabinet. See instructions on:
 How to Upload Your documents or organizers

Frequently Asked Questions

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What version of Excel can I use?

Our Excel organizers will work with Microsoft Excel 2003 or later.

What if I do not have Microsoft Excel?

There are free programs you can use to complete our organizers.
Try Apache OpenOffice **www.openoffice.org**
or LibreOffice **www.libreoffice.org**