



Questionnaire

When you Log in, you'll be taken to a screen like this:

Welcome to your Action Accounting client portal.
Here you can securely access all of your files and upload requested information.

You have 4 requests pending completion 0%

Agreements

Engagement Letter - Tax Planning Services Review & Sign

Signer 1 Me Has not signed

Signer 2 Action Accounting Has not signed

Questionnaires

Smart Tax Planning Questionnaire Open

Fill out questionnaire

[Add a message](#)

Documents

2023 Business Tax Returns (Federal and State) Drop files here or click to upload

Copies of your previous federal and state business tax returns

[Add a message](#)

2023 Individual Tax Returns (Federal and State) Drop files here or click to upload

Copies of your previous federal and state individual income tax returns. These will usually be your Form 1040s.

[Add a message](#)

0 documents Upload document

Type	Description	Size	Date uploaded	Search...	Filter
No folders or documents					

Click the blue Open icon to open the list of questions. To answer a question, select it to open up the response field. Skip any questions that do not apply to you.

