

Client Experience: Upload Documents



Brush Bernard LLP will provide a drop off link you can use to securely upload and deliver documents to them. The document transfer is fully encrypted and safe to use.



Please note:

The maximum amount of data that can be sent via a drop off link is 3GB.

1. Click the drop off link provided by the firm.

Please Upload Source Documents

 Annie McGoldrick
To  Annie McGoldrick


Reply Reply All Forward  

Wed 10/12/2022 1:43 PM


Hello Client,


Please use the link in my signature below to upload files.

Have a great day!

Annie M
Senior Product Support Specialist
Office: (855) 818-3552
Direct: 

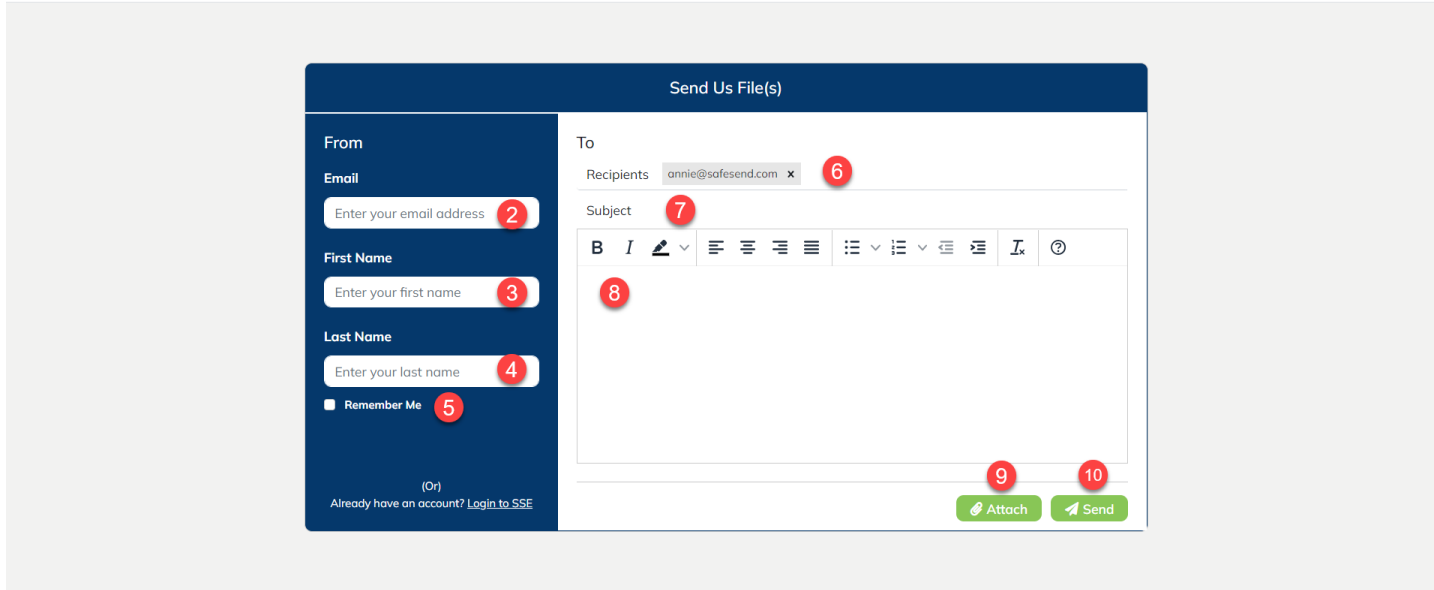
www.safesend.com
[Click Here to Send Me Files Securely](#)





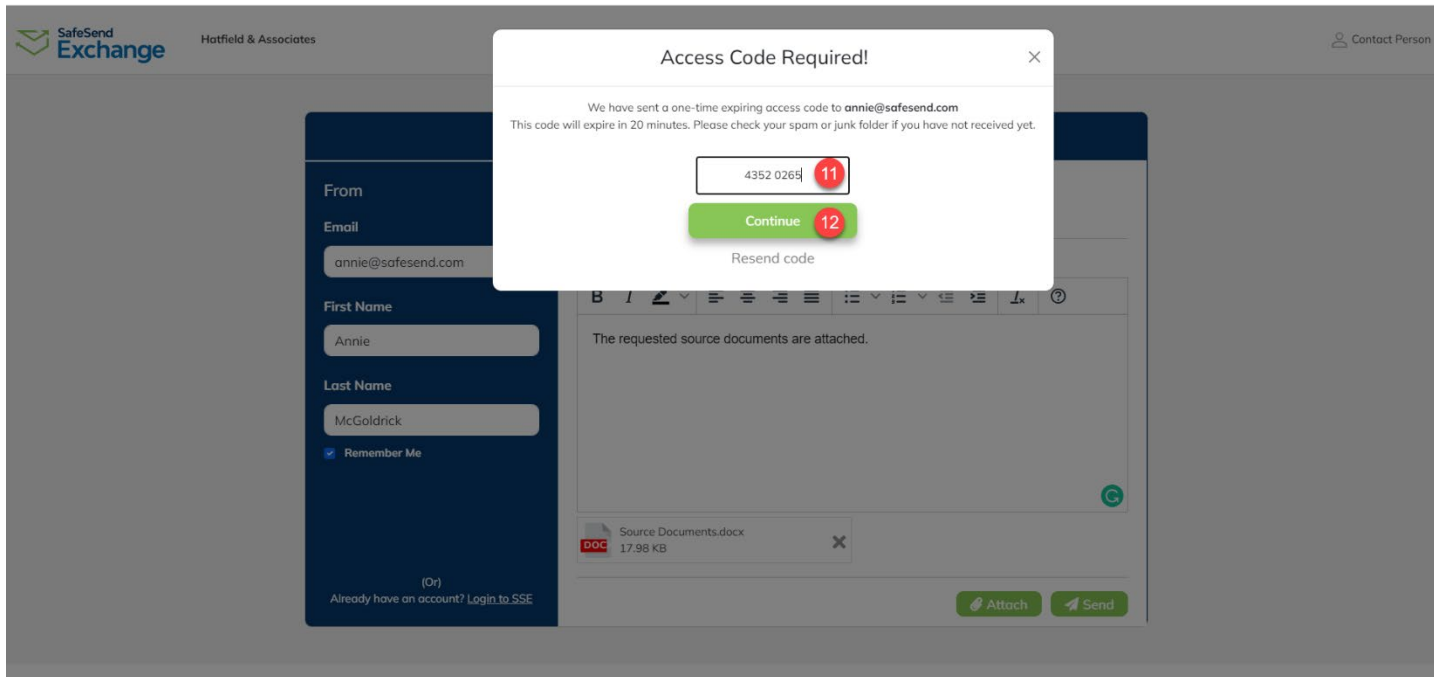
2. Enter your **Email** address.
3. Enter your **First Name**.
4. Enter your **Last Name**.
5. Click the **Remember Me** checkbox to have your email address and name auto-populate the next time you use a drop off link.
6. Ensure the document is being sent to the correct **Recipient**.
 - o Click the recipient field to select a different recipient.
7. Type a **Subject** for the message.
8. Type a **Body** for the message.
9. Click **Attach** to select the document(s) to upload.

10. Click **Send** to generate an **Access Code**.



11. Enter the access code sent to your email address.

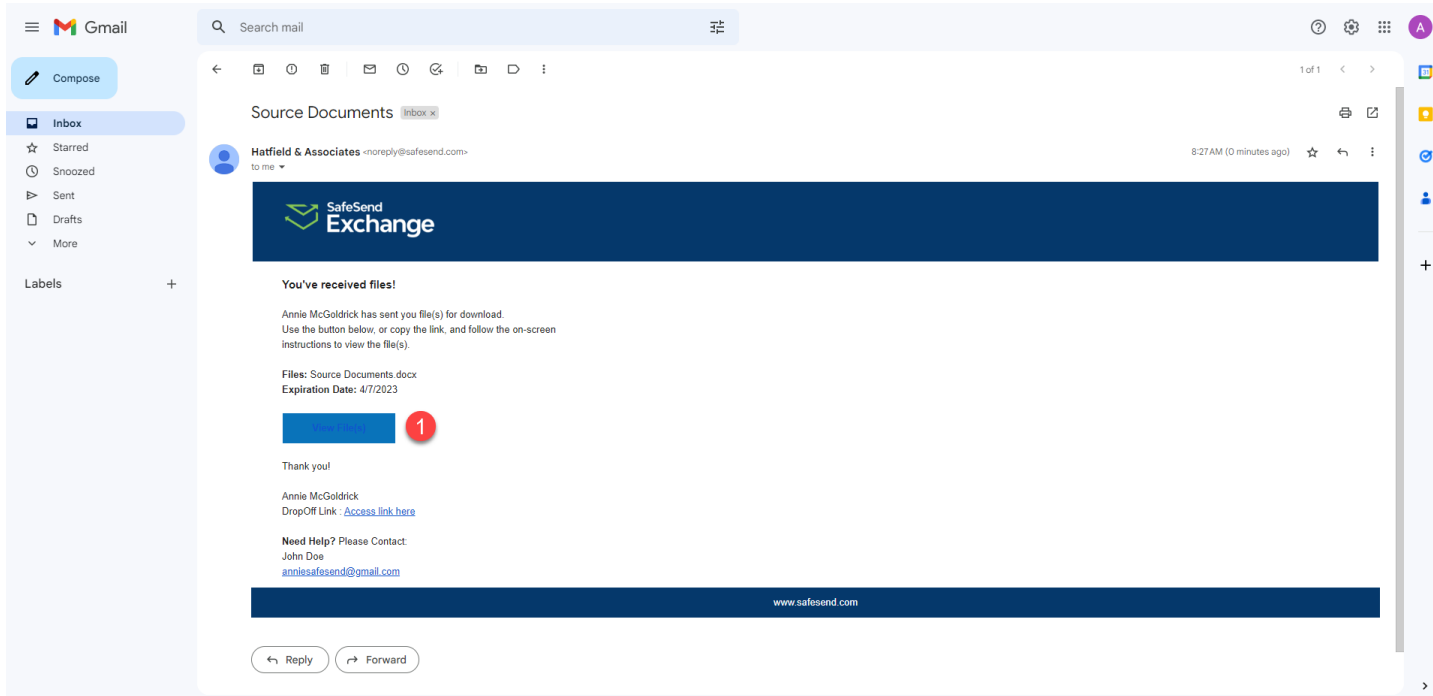
12. Click **Continue** to send the document(s) to the firm.



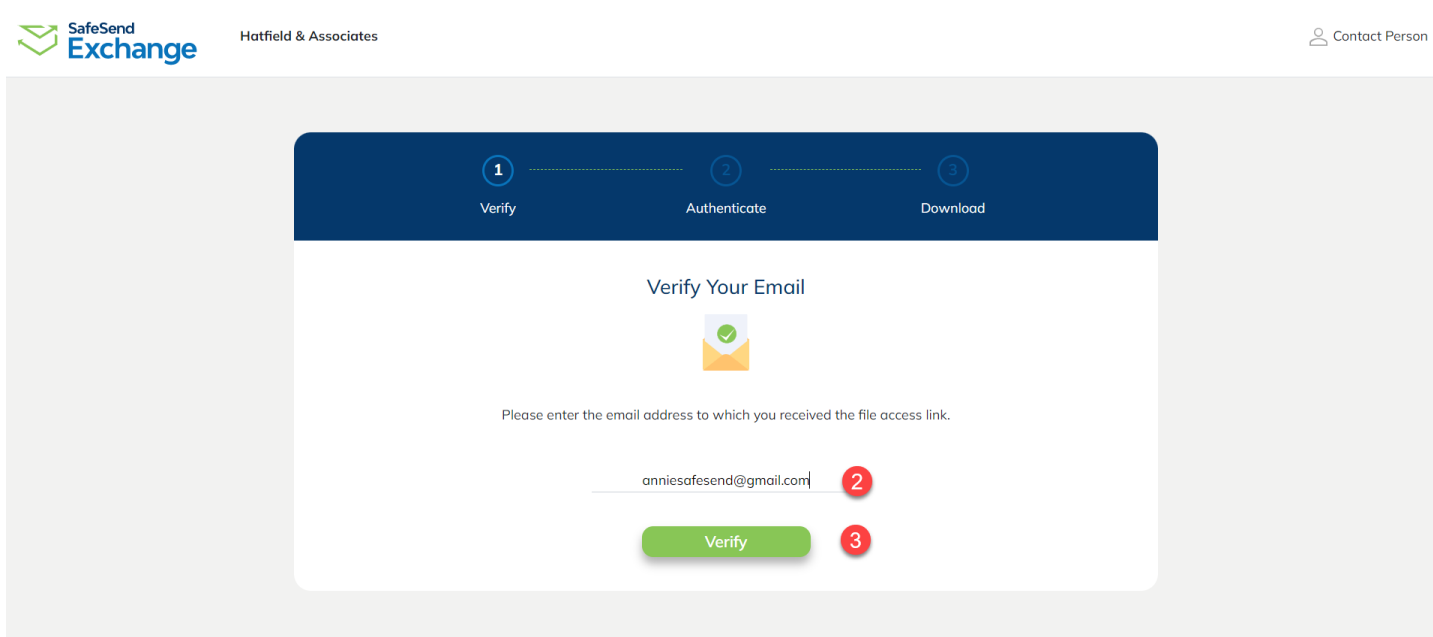
Client Experience: Download Documents

Brush Bernard LLP will provide an access link via email you can use to download documents sent to you. The document transfer is fully encrypted and safe to use.

1. Click the access link provided by your firm.

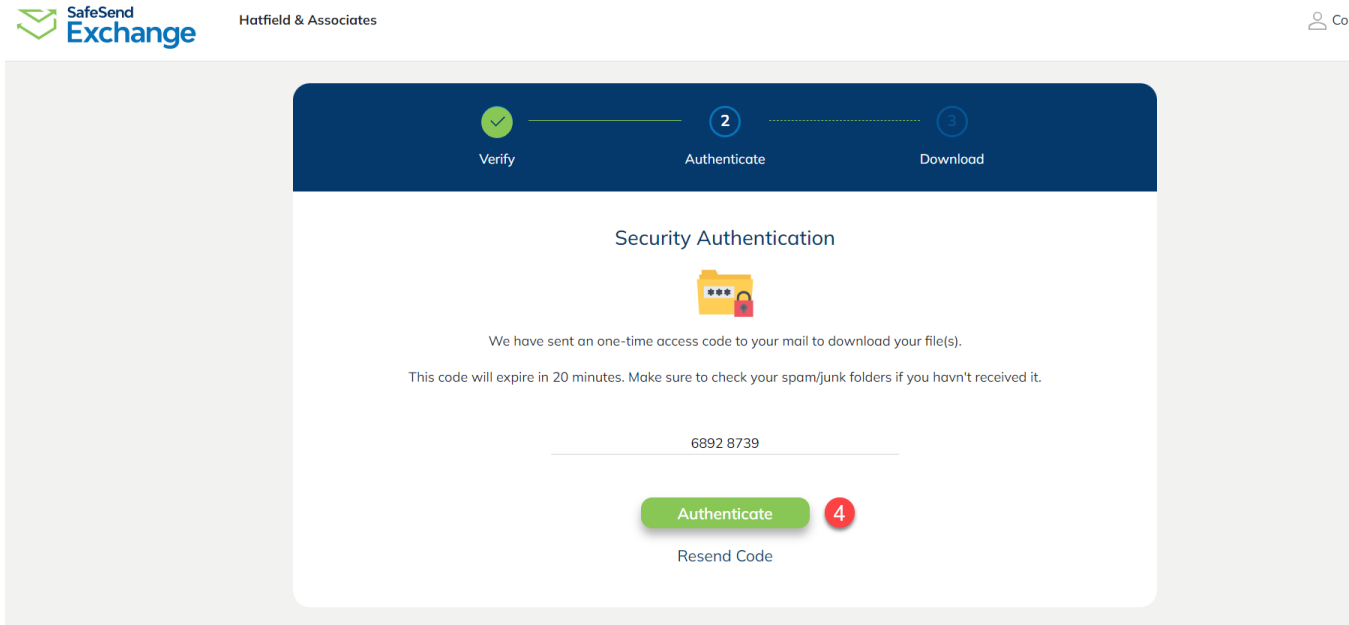


2. Enter your email address.
3. Click **Verify**.

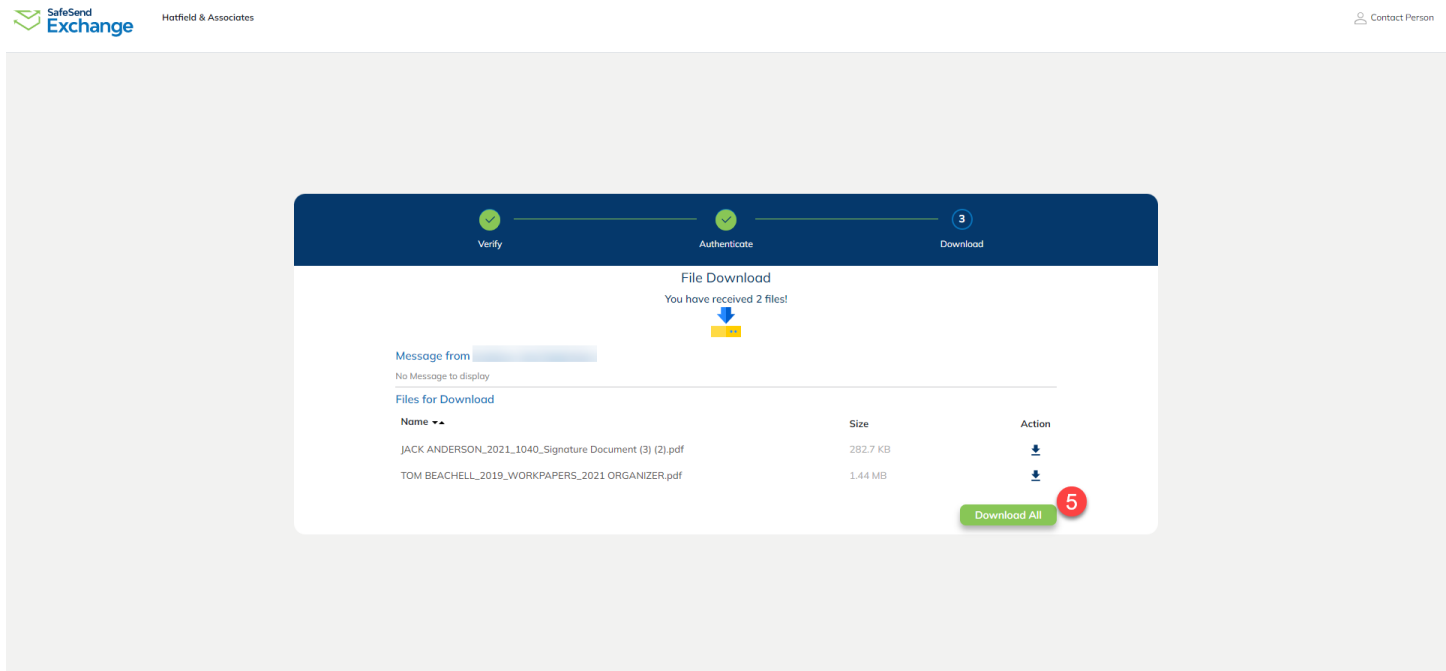


4. Complete your authentication.
 - o If you were sent an Access Code, check your email for the code, then enter it and click **Authenticate**.

- If you were sent a Q&A question then answer the question provided by your CPA and press **Authenticate**.



5. Download the files you prefer or press download all by pressing the **Download All** button.



You can close the webpage and access it again later by clicking the original link.