LEXINGTON FINANCIAL

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E-organizer Instructions

Prior to your tax appointment, you will receive a secure email with the Tax Organizer attached. The email with have the following information:

- From: Tax Organizer Administrator.
- Subject: Lexington Financial: Tax E-Organizer.

Open the email. Follow the instructions in the email on how to download your e-organizer to your computer. In the body of the email will be a website link from which you will download the organizer. Click on the link to retrieve your e-organizer then click the "**Save"** button to save it to your computer. Be sure to *remember* where you saved it on your hard drive.

Next, go to where you saved it on your computer. The name of the e-organizer file that you downloaded is EOrg2022.exe. Double click the file to open the organizer and enter your password. **Your password is your zip code + the last four digits of your Social Security number.** Click the "**Continue"** button.

A screen similar to the one below will be displayed with instructions on how to use, edit, update, and add new information into the e-organizer. Be sure to click the "**Save**" button to save any changes. If you have any questions, please don't hesitate to call us (phone 408-395-5000).

To return the completed e-organizer to Lexington Financial:

1. Click the "**Return to Preparer**" button.
2. On the next window, click the "**Yes**" button to save all changes and updates.
3. On the next screen, make sure the option "E-mail to Lexington Financial (eorg@lexington-finance.com)" is checked. Click the "**Send**" button.