

SUTHERLAND CAMPBELL TAX & FINANCIAL SERVICES, INC.

Providing Financial Solutions

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January 12, 2026

INSTRUCTIONS for TROUBLE-FREE TAX DOCUMENT UPLOAD

Sutherland Campbell Tax & Financial has made it *easy and safe* for you to upload your tax backup documentation to your preparer electronically.

Helpful Hints

1. Please **be sure your uploads are readable** – if the resolution on your scan/image is too low we will have to ask for a replacement or a hard copy.
2. Try to send **PDF files** when possible. Image files are more difficult for us to manage efficiently.
3. Try to send **multiple documents in one PDF** when you can. Do NOT send folders.
4. Make sure **any filenames contain your last name** at the very least so we can identify that it came from you at glance.
5. Please try to wait until you have at least **80% of your documents** before sending them to us so we can begin work with the majority of what we need on hand.
6. You do NOT need to upload 1099s for your LPL investment accounts if we are the advisors.
7. Make sure your **keep your original documents** and match them up with your finished copy of the tax return.

READY TO UPLOAD? GREAT! CLICK BELOW

[UPLOAD NOW](#)

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TAX PREPARATION SERVICES

Individual · Business · Estate

INVESTMENT SERVICES*

Financial Planning · Investment Advisory
Securities · Pension Plans

INSURANCE SERVICES

Life · Disability · Long-Term Care
Business

*Securities and Advisory Services are offered through LPL Financial, a Registered Investment Advisor, Member FINRA/SIPC. Tax Preparation Services offered through Sutherland Campbell Tax & Financial Services, Inc. a separate entity from LPL Financial. LPL Financial does not provide tax advice.
