

Sending and Receiving Tax Documents with Boulay

To protect our staff and clients against virus spread, we encourage clients to use digital or “hands-free” delivery methods where possible. Currently, Boulay offers the following methods to our clients:

- **Boulay Portal:** If you have access to scan your documents or take images of them, you can upload the files directly to our portal at <https://portal.boulaygroup.com>. If you need directions on how to create or activate your user account, [CLICK HERE](#) for more information. Don't have a scanner? Try the Microsoft Office Lens App. This free app makes your Android or iPhone a portable scanner. For more information related to mobile scanning using Microsoft Office Lens, [CLICK THIS LINK](#).
- **Mail:** All tax return documents and data can be mailed using the addressed tax organizer you originally received from Boulay in early January.
- **Email:** Tax return documents and data can be emailed to your Boulay client service team representative. However, if possible, we recommend using our portal for safe file transfer. Otherwise, we emphasize that files sent via email should be protected prior to delivery.
- **Curbside Drop off:** Clients can drop off or pick-up documents using a curbside system at our Eden Prairie, MN or Naples, FL offices. Once you arrive in the parking lot, you can call the Eden Prairie main line at 952.893.9320 or the Naples main line at 239.325.1100. A Boulay employee will come down and pick up your documents so you do not need to leave your vehicle.
- **Eden Prairie Drop Bin:** A bin clearly marked is located on our 8th floor outside the elevators for you to drop off your documents.