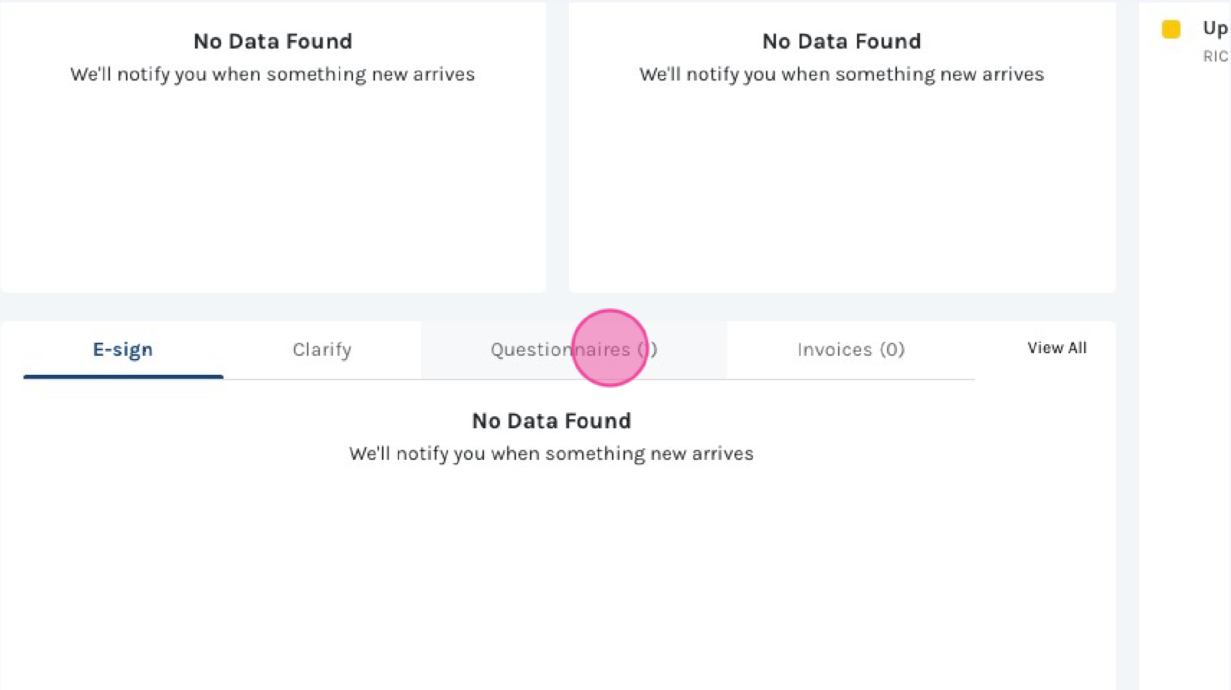
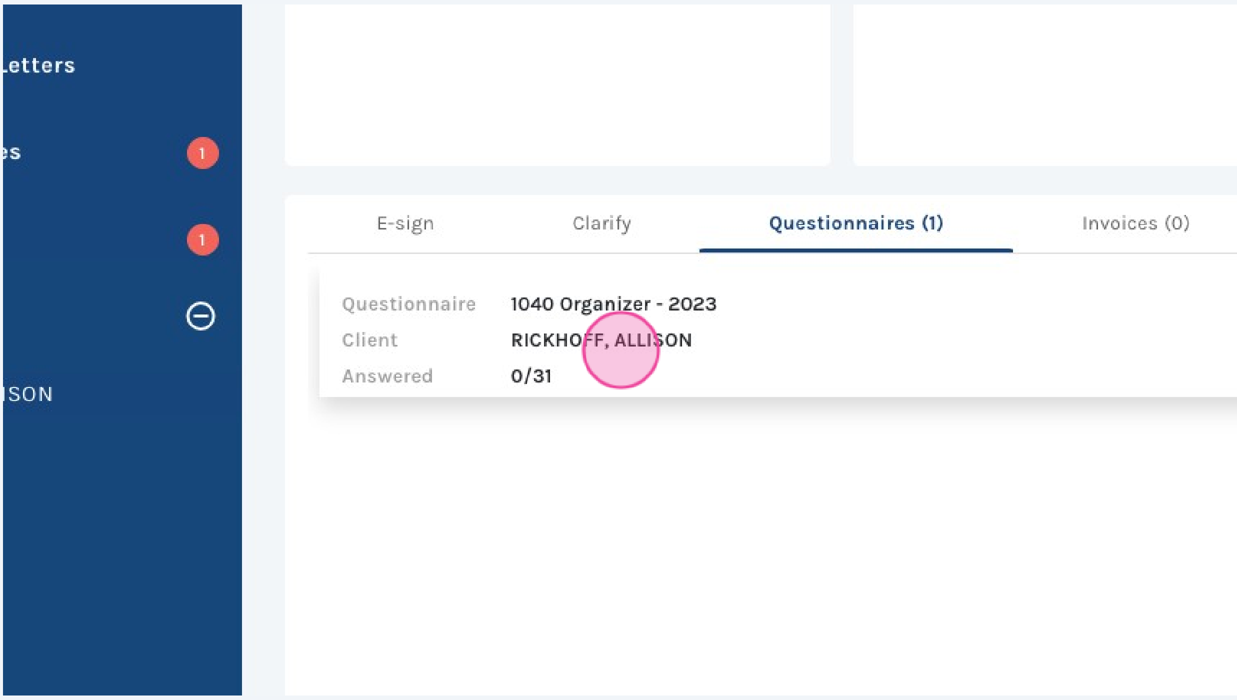
Tax Organizer Submission Via Qount

1 Navigate to https://rickhoff.qount.io/home-dashboard

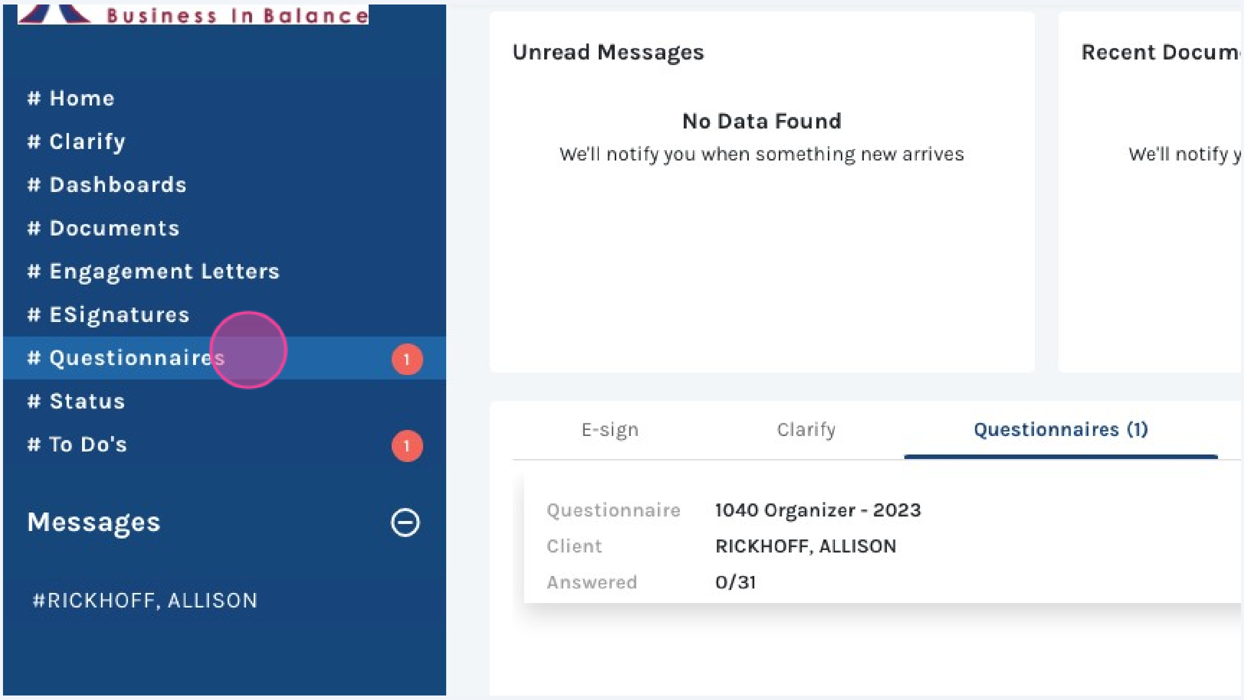
2 Click "Questionnaires"



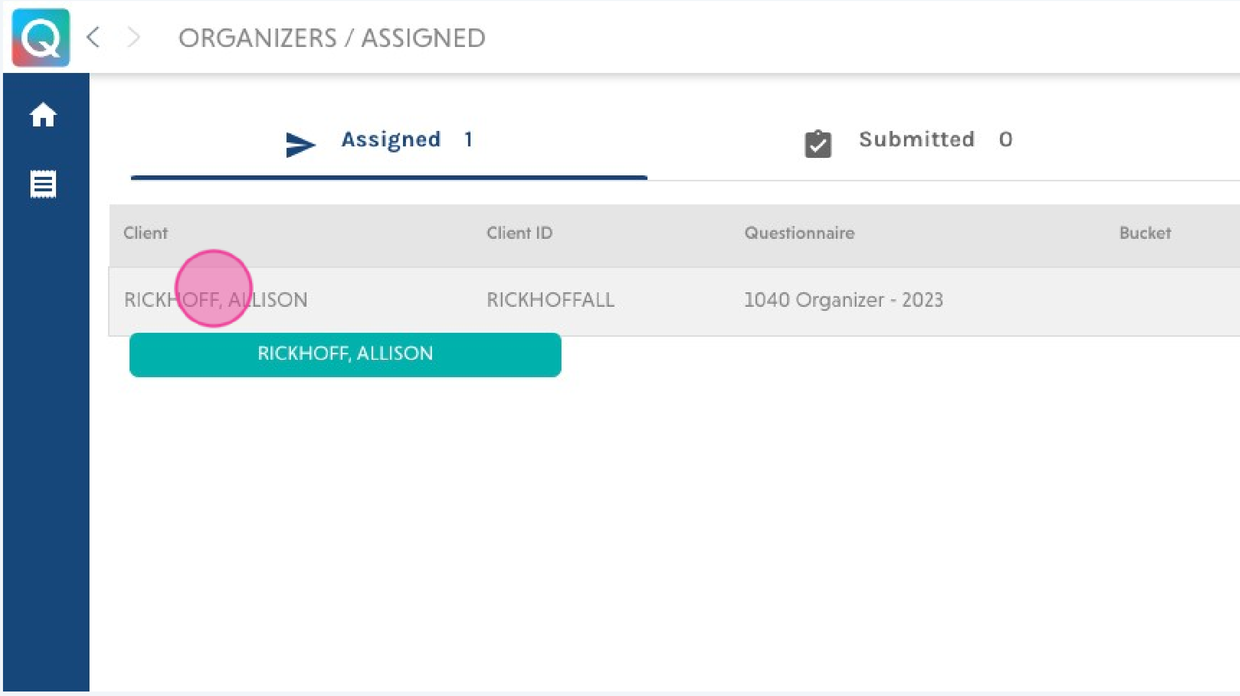
3 In this tab you will see any questionnaires that you need to fill out.



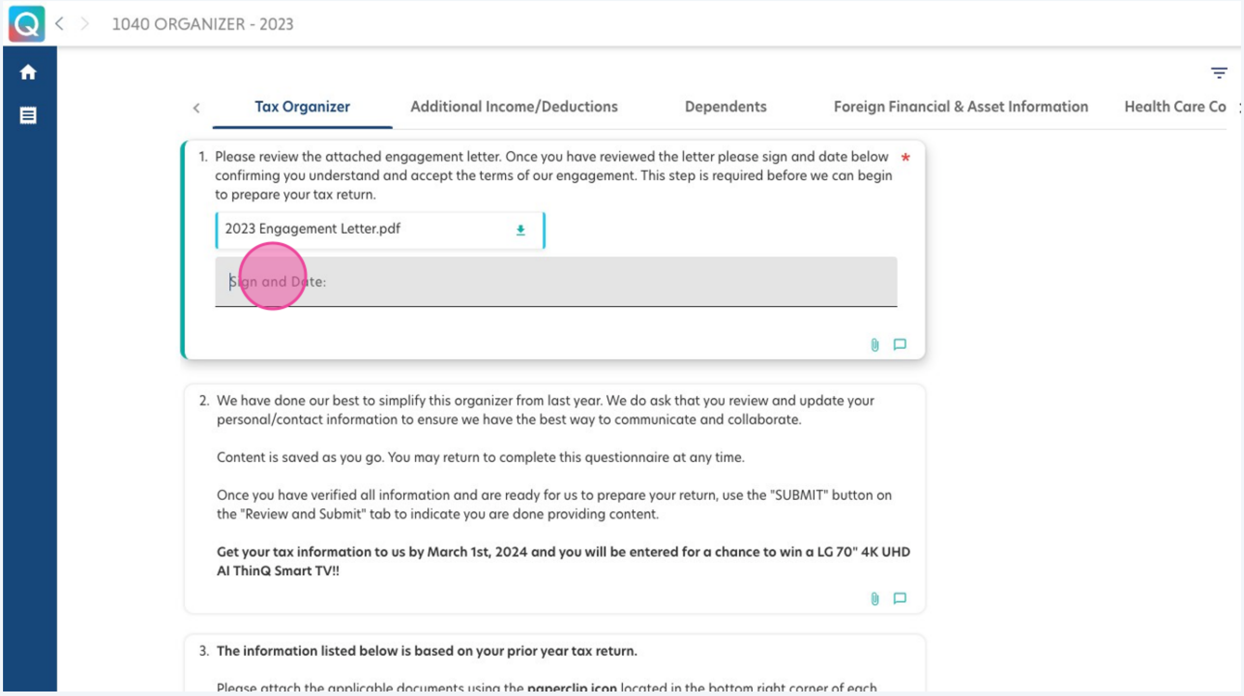
4 Click "# Questionnaires" to navigate to your organizer.



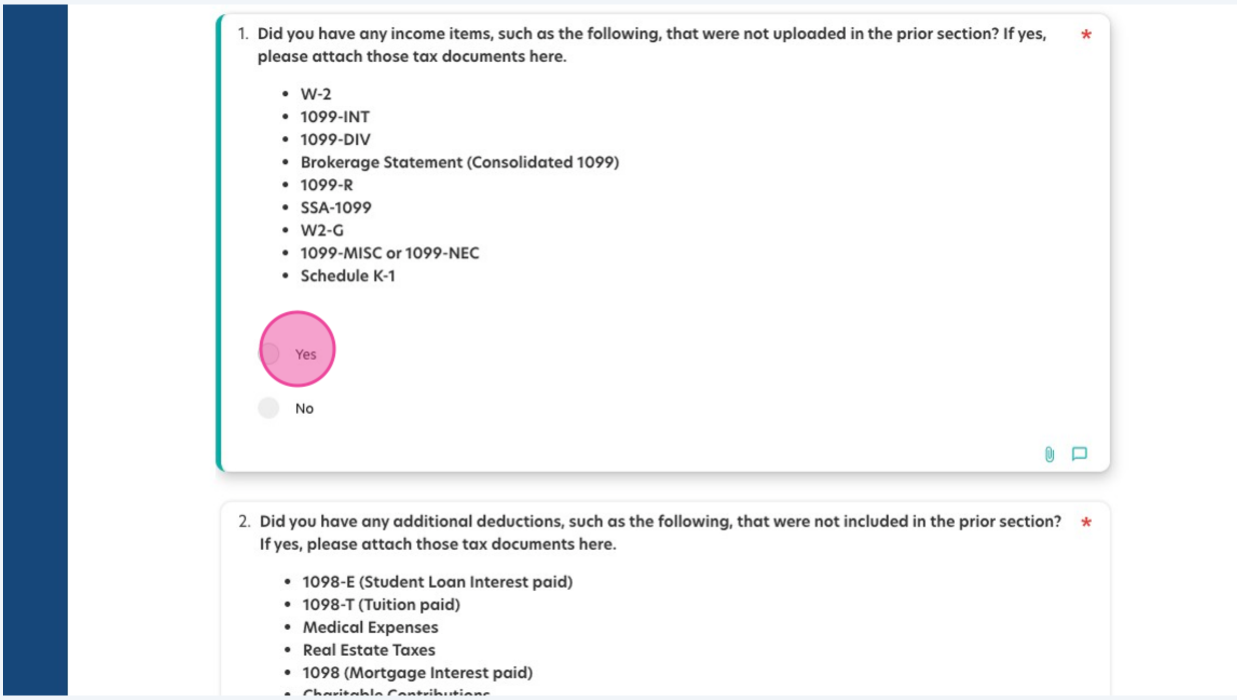
5 Click "RICKHOFF, ALLISON
RICKHOFF, ALLISON"



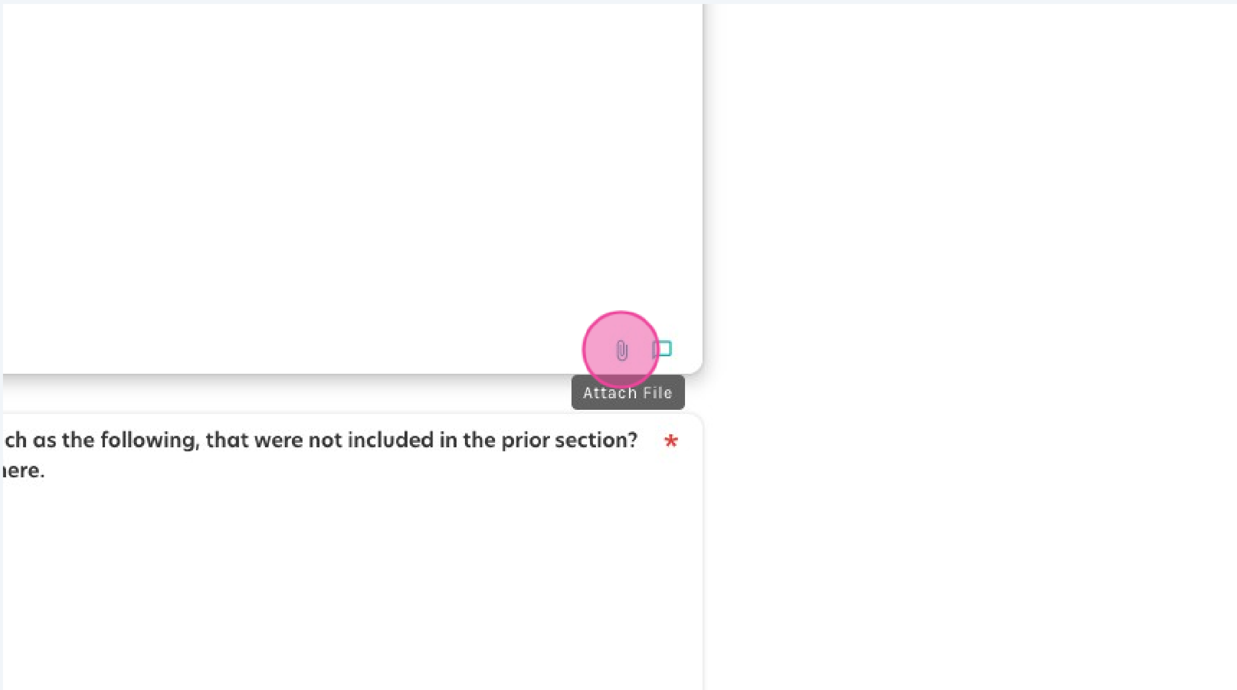
6 Click the "Sign and Date:" field and start to fill out. Then click the arrow ont he bottom to proceed.



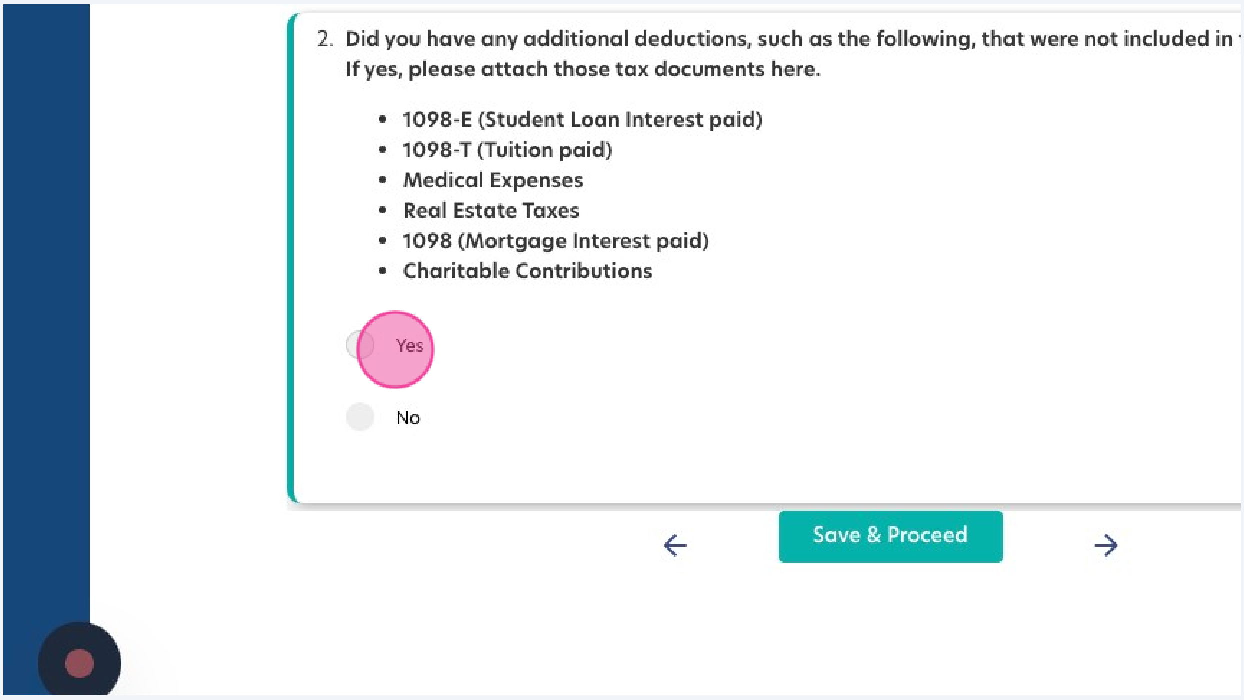
7 Answer the following questions to the best of your ability.



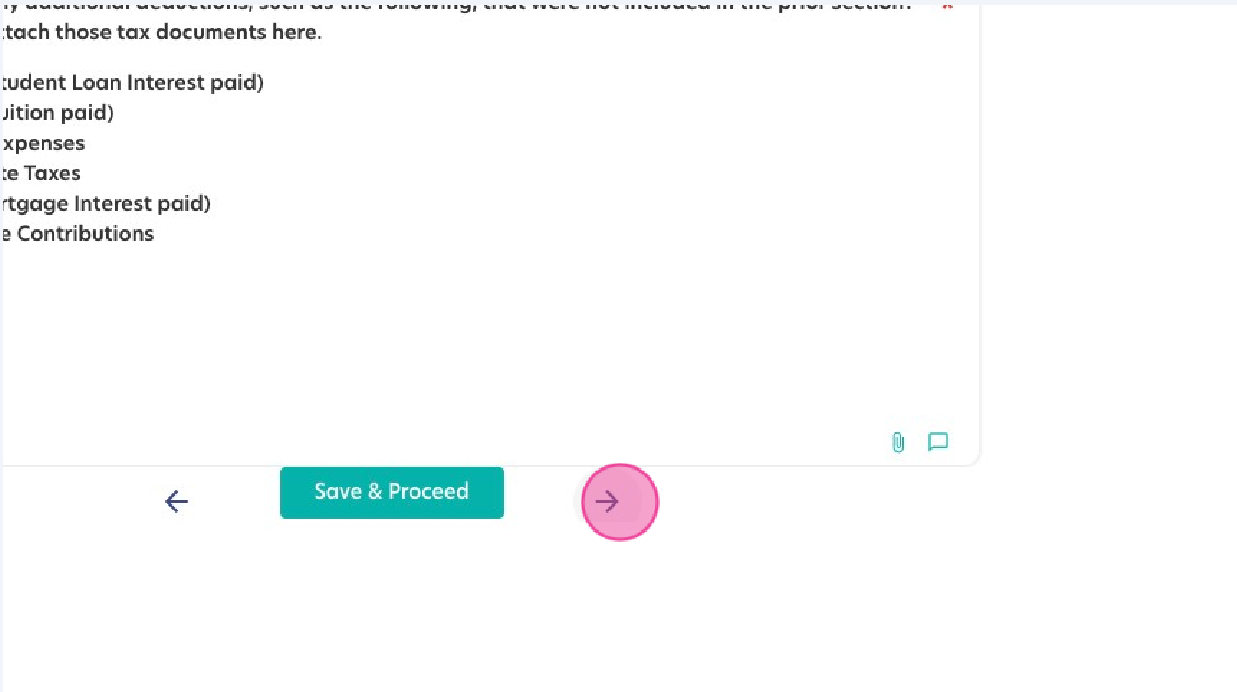
8 Click "attach_file" to attach any documents to the appropriate question. In this case, attach any W2s, 1099s, etc.



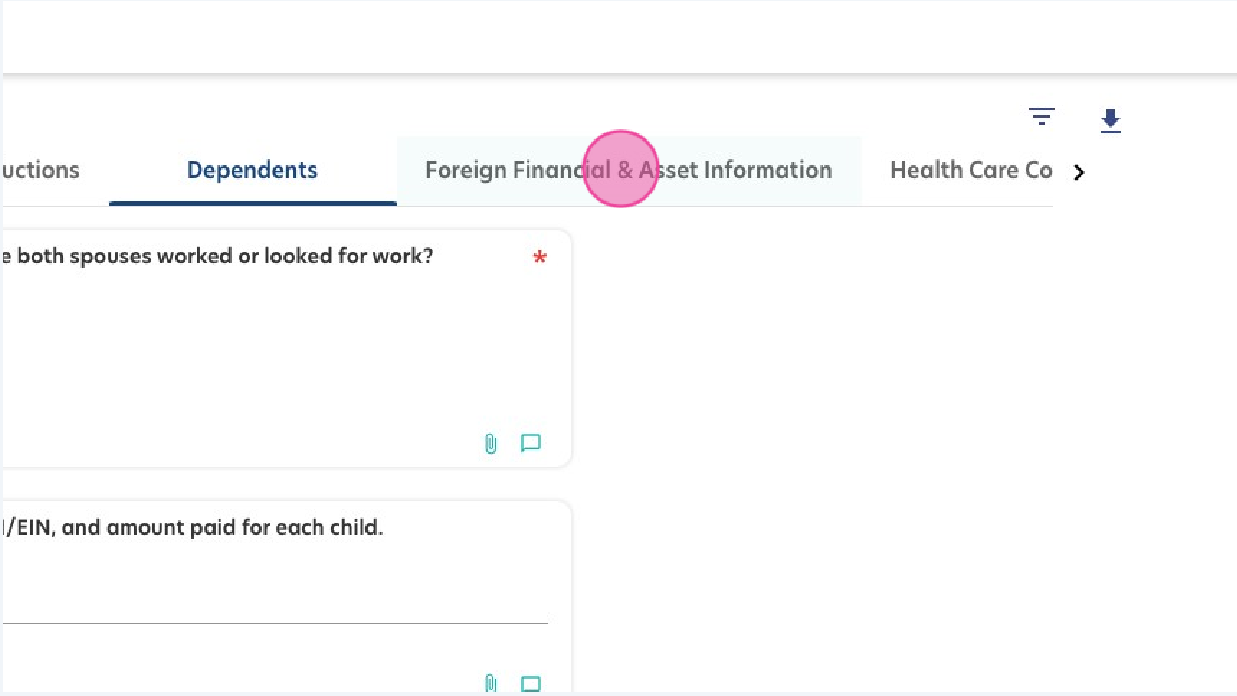
9 Continue filling out the organizer.



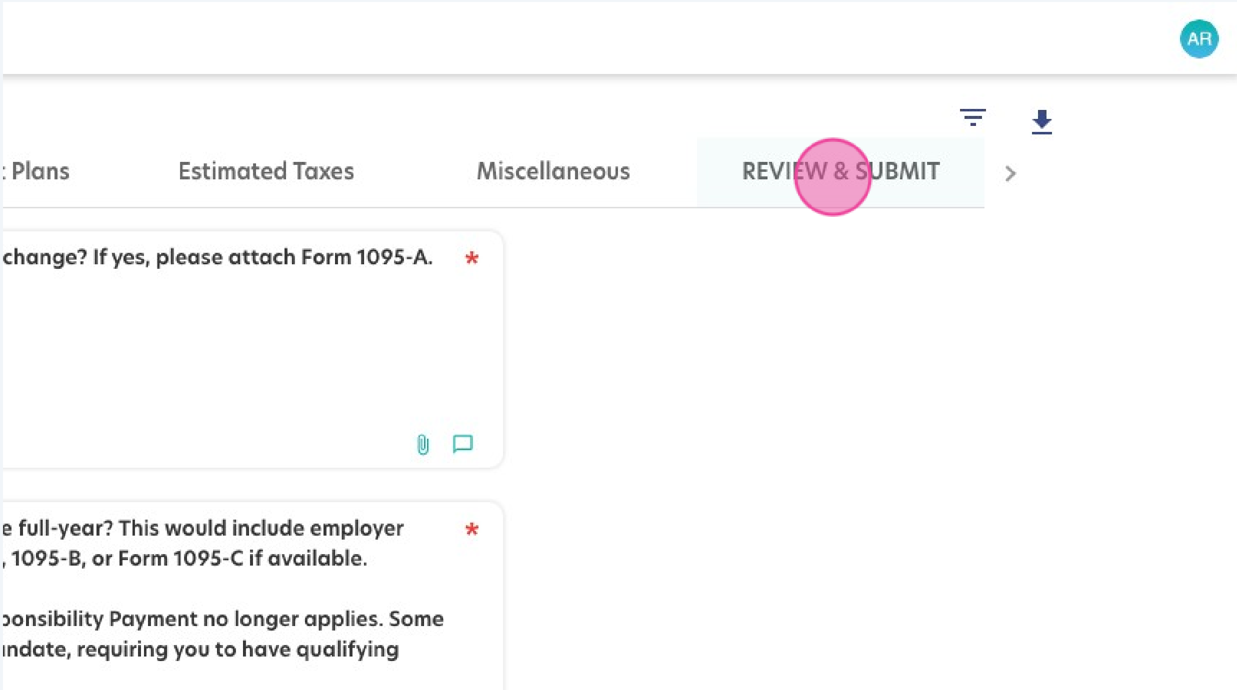
10 Click here to proceed. Or if you need to come back later you can click "Save & Proceed"



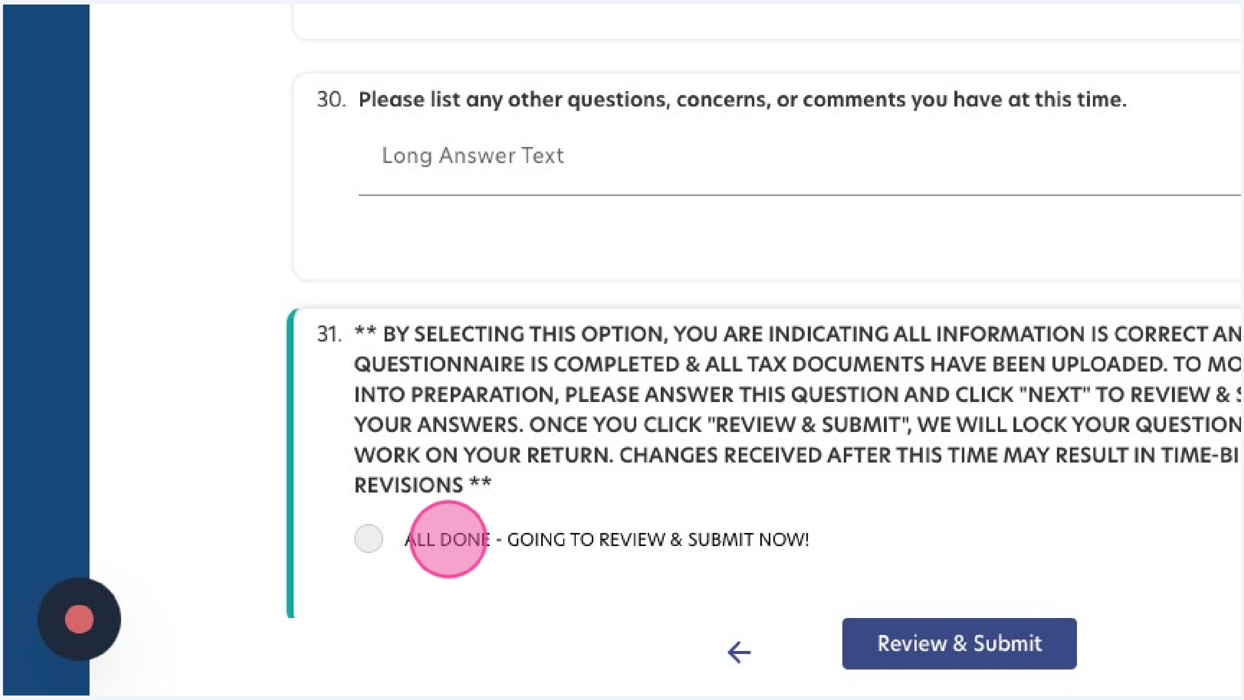
11 Click "Foreign Financial & Asset Information" on the top if you wish to navigate to a different tab.



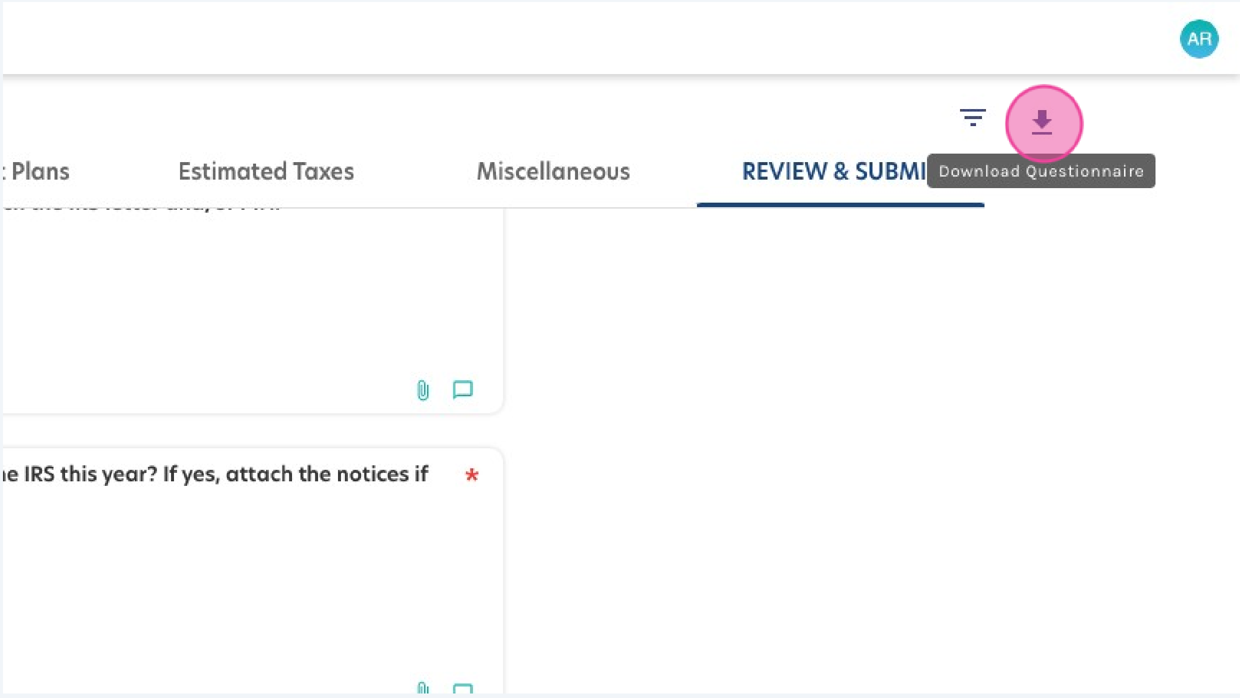
12 "REVIEW & SUBMIT" is the last tab o the organizer.



13 Click "ALL DONE - GOING TO REVIEW & SUBMIT NOW!" when you are done filling it out.



14 Click "file_download" if you wish to download the organizer to a pdf file or print it out.



15 If you have finished filling it out and submitted the organizer you are done and can wait for an update on your return!