

Upload a Client Tax Return

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Navigate to <https://app.fpalpha.com/advisor/clients>

Clients

Client list summary

Household

0

Business owners

0

Retired

0

Average Net worth

\$0

Company credits

Tax planning

Unlimited credits

Home insurance

0 Requested 15 Remaining

Estate planning

0 Requested 30 Remaining

Auto insurance

0 Requested 15 Remaining

Renewal date Feb 05, 2026

Favorite clients

★ Henry C. & Mary Price

⊕ Add new client

Filter

Name	Net Worth	Tax Planning	Estate Planning	Home Insurance	Auto Insurance	Last view	
★  Henry C. & Mary Price Demo client	\$14,000,000	Tax year 2023 	Snapshot 	Snapshot 	Snapshot 	Jul 24, 2025 8 days ago	
 John E Adamson Demo client	\$9,000,000.00	Tax year 2022 	Snapshot 	Snapshot 	Snapshot 		

30

?

2 Click on your client file

You are now in your client list

Clients

Client list summary

Household 0

Business owners 0
Retired 0
Average Net worth \$0

Company credits

Renewal date Feb 05, 2026

Tax planning
Unlimited credits

Home insurance
0 Requested 15 Remaining

Estate planning
0 Requested 30 Remaining

Auto insurance
0 Requested 15 Remaining

Favorite clients

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[+ Add new client](#)

Name	Net Worth	Tax Planning	Estate Planning	Home Insurance	Auto Insurance	Last view
★ Henry C. & Mary Price Demo client	\$14,000,000	Tax year 2023	Snapshot	Snapshot	Snapshot	Jul 24, 2025 8 days ago
John E Adamson Demo client	\$9,000,000.00	Tax year 2022	Snapshot	Snapshot	Snapshot	

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3 Click "Data & Documents"

Henry C. & Mary Price 56%/100%

Client list

Client Dashboard

Data & Documents

Snapshots

Insights

Task manager

Simulators

Reports

Henry C. Price
Male, 39
Business owner Actuary at Metlife

Mary Price
Female, 37
Same Address

Household Summary

\$14,000,000 Net-Worth **56 / 100%** Optimization Level

Married 3 Children Oregon

Analysis By Area [Add New Area](#)

Tax Planning
72% / 100%
3 tasks to complete

Tax Return year	Filing Status	Adjusted Gross Income	Federal Tax Bracket
2023	Married Filing Jointly	277,238	24%

4 Click "View/Upload Tax Return"

The screenshot shows a dashboard titled "Data & Documents". On the left is a sidebar with navigation icons for Client Dashboard, Data & Documents (highlighted), Snapshots, Insights, Task manager, Simulators, and Reports. The main content area has a top navigation bar with "Last updated", "Personal info", "Family", and "Assets". Below this is a table with columns for "Area", "Documents uploaded", "Upload date", "Snapshot generated", and "Insights generated". The "Tax Planning" row is highlighted, and its "View Tax Return" button is circled in orange. Other rows include "Estate Planning", "Home Insurance", and "Auto Insurance".

Area	Documents uploaded	Upload date	Snapshot generated	Insights generated
Tax Planning	Tax year 2023.pdf	02/04/2025	✓ Tax year 2023	✓ Instant
Estate Planning	henry-will.pdf price joint trust.pdf henry hcd.pdf 4 more	02/04/2025	✓ 02/04/2025	✓ In-Depth
Home Insurance	Henry-home-primary-residence.pdf Henry-umbrella.pdf	02/04/2025	✓ 02/04/2025	✓ In-Depth
Auto Insurance	Henry-auto.pdf	02/04/2025	✓ 02/04/2025	✓ In-Depth

5 Select the corresponding year of the tax return

The screenshot shows a form titled "Tax Planning" with a search bar and buttons for "Cancel", "Save For Later", and "Submit". The form asks for information from "Henry C.'s" tax return. It includes a "Federal Tax Return file upload" section with a dropdown for "Select the year of the tax return" (set to 2023) and a dropdown for "Filing status on 2023 tax return" (set to Married Filing Jointly). Below this is a section for uploading the federal tax return, with a note to upload a native PDF. A sample of a 2023 U.S. Individual Income Tax Return (Form 1040) is shown. The "Choose" button is highlighted with an orange circle.

Tax Planning [Download the questionnaire as PDF.](#)

Please provide information from **Henry C.'s** filed tax return or estimates of his/her current income.

Federal Tax Return file upload

Select the year of the tax return: 2023

Filing status on 2023 tax return: Married Filing Jointly

Upload your federal tax return, make sure it matches the year you already selected
For best results, upload a native PDF of your tax return (not a scan or photograph of a paper statement or a screenshot).
[Click here to see an example.](#)

Form 1040 Department of the Treasury - Internal Revenue Service
U.S. Individual Income Tax Return 2023

[Choose](#) Select tax return

6 Choose the year

fp alpha

Cancel

Save For Later

Submit

Tax Planning

[Download the questionnaire as PDF.](#)

Please provide information from **Henry C.**'s filed tax return or estimates of his/her current income.

Federal Tax Return file upload

Select the year of the tax return

2022
2023
2024

Filing status on 2023 tax return.

Married Filing Jointly

Upload your federal tax return, make sure it matches the year you already selected

For best results, upload a native PDF of your tax return (not a scan or photograph of a paper statement or a screenshot).
[Click here to see an example.](#)

Form 1040 Department of the Treasury—Internal Revenue Service U.S. Individual Income Tax Return 2023

Choose

Select tax return

7 Click "Choose" to browse for your the tax return

Please provide information from **Henry C.**'s filed tax return or estimates of his/her current income.

Federal Tax Return file upload

Select the year of the tax return

2024

Filing status on 2024 tax return.

Married Filing Jointly

Upload your federal tax return, make sure it matches the year you already selected

For best results, upload a native PDF of your tax return (not a scan or photograph of a paper statement or a screenshot).
[Click here to see an example.](#)

Form 1040 Department of the Treasury—Internal Revenue Service U.S. Individual Income Tax Return 2024

Choose

Select tax return

Type of analysis ?

Would you like to receive an instant analysis or provide additional information for an in-depth analysis?

To answer the questionnaire select *in-depth analysis*

Instant tax analysis

In-depth analysis

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