


Tax Preparer's Guide: How to Add Company Logo or Text to the Organizer

Instructions written for Windows 10 and Adobe Reader DC.


The 1040 Tax Organizer has an open space at the top of the first page where you can add company-specific information (such as a logo) before forwarding the organizer to your clients.

Add Company Logo

 **Note:** The graphic will need to be in one of the following formats: .bmp, .gif, .jpg (.jpeg), or .tif.

- 1) **Resize the image in Microsoft Paint.** When working with an image that is extremely large (or small), you should make the initial size adjustments in Microsoft Paint, since the image quality will decrease some when you resize the graphic in Adobe Reader.
 - a) Open the company logo graphic in Microsoft Paint.
 - b) On the **Home** tab toolbar, click **Select** and then choose **Select All** from the drop-down menu (or Ctrl + A).
 - c) Then click the **Resize** button on the **Home** tab (or Ctrl + W).
 - d) In the window that pops up, change the Horizontal and Vertical percentages (you can check "Maintain aspect ratio" to make sure the image stays proportional). To increase the image size, use a number over 100%; to decrease the image size, use less than 100%.
For example: Using a percentage of 200% will double the size of the image, while using a percentage of 50% will shrink the image to half its original size.
- 2) **Copy the file from Microsoft Paint.** Click **Select** from the **Home** toolbar and then choose **Select All** from the drop-down menu (or Ctrl + A). Then click **Copy** from the **Home** toolbar (or Ctrl + C).
- 3) In **Adobe Reader DC**, open the Tax Organizer and then go to **Edit**→**Paste** (or Ctrl + V) to paste the logo on the first page of the organizer.
- 4) **Resize the image in Adobe Reader.** If you need to make further size adjustments to the graphic after you have inserted it into Reader, use the following steps:
 - a) Click on the image in Adobe Reader.
 - b) Click on one of the white boxes that appear in the four corners of the graphic.
 - c) While holding down your left-mouse button, drag the box to resize the image. If you drag the box in, Reader will shrink the image, and if you drag the box out, Reader will enlarge the image.
 - d) When you achieve the size you want, release the left-mouse button.
- 5) **Move the image in Adobe Reader:**
 - a) Click on the center of the image in Adobe Reader.
 - b) While holding down your left-mouse button, move the image where you want it.
 - c) Release the mouse and click off of the image.

Add Text Using the Text Tool

 **Note:** If instead of a logo, you would rather add text in the blank space at the top of the organizer, use the following steps. You can create multiple text boxes.

- 1) Open the Tax Organizer in **Adobe Reader DC**.
- 2) Click **Comment** on the **Tools panel** found on the right-side of the screen (if you don't see the **Tools panel**, then click the small arrow on the right-edge of the screen). This will open the **Comment Toolbar** across the top of the screen.
- 3) Click the **Add Text Comment** tool (the tool looks like a capital "T").
- 4) Click in the blank space where you would like to add text, and then start typing. After you start typing, the Text Toolbox will become active (it is grayed out until you add text) and you can now pick the Font type, color, and size.
- 5) If you want to move your text, click on the Comment listed in the Comment Panel on the right-side of the screen. This will add a blue box around the text. Hover your mouse along the edge of the box until it turns into four arrows that make a + sign. Now you can move your text to where you would like it.

Save the PDF

- 1) Go to **File**→**Save As** and save the PDF on your computer. You will want to save it in a location you will remember with a name you and your clients can identify.
- 2) This version of the Tax Organizer will be the one you will want to email to your clients.

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