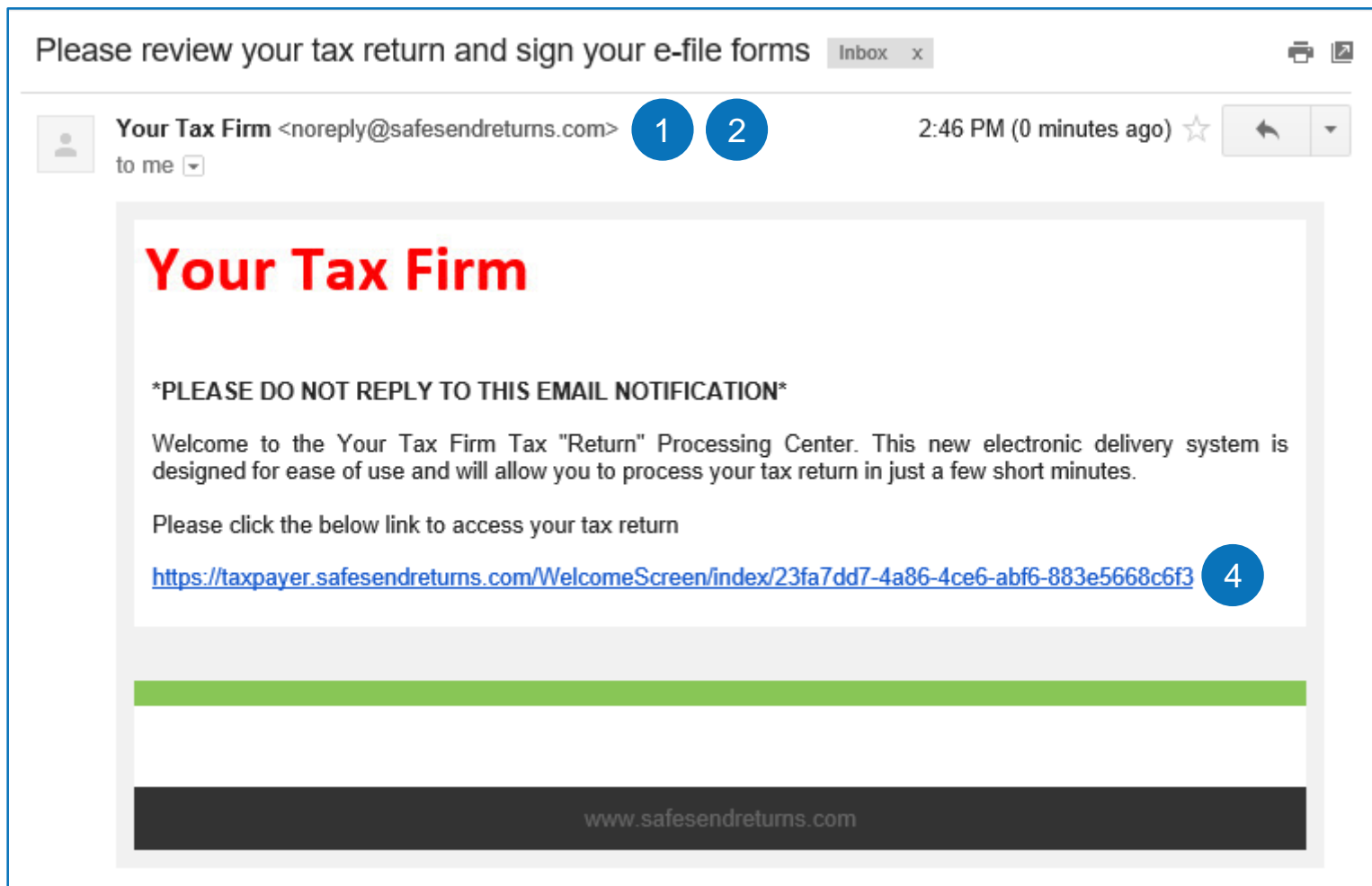


# QUICK REFERENCE TAXPAYER



[safesend.com](https://safesend.com)

- 1 **Your tax firm** will send you a secure email like the one shown below
- 2 **The email** will come from *noreply@safesendreturns.com* or *noreply@safesend.com*
- 3 **We recommend** that you add these email addresses to your safe list to avoid them going to junk
- 4 **Click** the link in the email



## Welcome to Your Tax Firm

Welcome to the Your Tax Firm Return Processing System. This system is designed to simplify your review of your Tax Return, and expedite the required steps for Electronic Filing. Each step will include additional instructions to ensure successful completion of the process. As you continue through the necessary actions, should you need to finish later, you may save your progress and return another time.

Pat Taxpayer, Please enter the last four digits of your Social Security Number:

9991

1

**Enter** requested  
information  
(SSN/EIN)

2

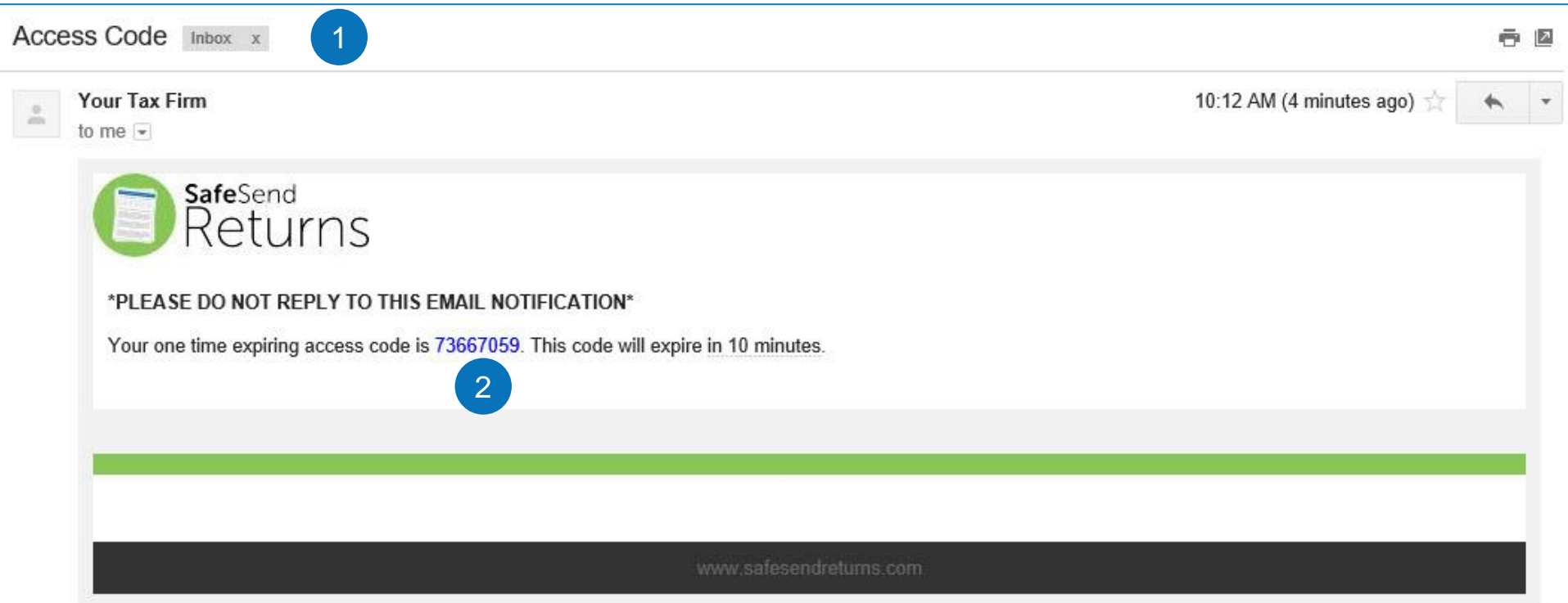
**Click**  
"Authenticate to  
continue"

1

2

Authenticate to continue

- 1 **Your tax firm** will send you a secure email like the one shown below with an Access Code
- 2 **The email** will come from *noreply@safesendreturns.com*
- 3 **Copy** the Access Code and return to your browser



## Welcome to Your Tax Firm

Welcome to  
designed to s  
steps for Ele  
successful co  
actions, shou  
another time.

Access Code Required:

We have sent a one-time expiring access code to your email. This code will expire in 10 minutes. Please enter below and select Continue.

em is  
e required  
ns to ensure  
necessary  
and return

Pat Taxpayer, Please enter the last four digits of your Social Security Number:

① **Check** your email and enter code from email into "Access Code Required" field

② **Click** "Continue"

## 2015 Tax Return

## Contact Person

Alexander Maxwell

Details

## Refunds

Alabama

\$52

California

\$393

## Overpayments Applied

California

\$500

## Payments Due

Federal

\$368

Welcome Pat Taxpayer, your 2015 tax returns are ready!

## A message from your tax preparer

Hi Pat,

Please review and e-sign your return.

Thank you

Please follow these easy steps so your taxes can be filed



Download Tax Documents



Sign Forms



Make Payments

Let's Get Started

This page is an overview of your return and may contain an important message. **Review and click** to continue.



Download Documents



Sign



Pay

Please download and review your tax documents



Download all my  
tax documents

1

## Your 2015 Tax Documents

Optionally select a single document to download

### Tax Documents

2015 Tax Returns



### Payment Vouchers

Payments Due On 1/1/1753



Payments Due On 4/15/2016



Payments Due On 4/18/2016



Payments Due On 6/15/2016



Payments Due On 9/15/2016



Payments Due On 1/15/2017



Payments Due On 1/17/2017



### Invoice

Tax Preparation Fee



1

**Download and review** all your  
tax documents.

2

**Click** to continue.

2



Sign documents

How would you like to sign your documents?

**Sign Electronically****Save & manually Sign**

Before signing, please verify/enter the information requested and click "Continue" to begin.

Your Date Of Birth: Jan ▼ 1 ▼ 1948 ▼

1

2

☒ I have reviewed my tax return and consent to e-sign**Spouses signature required**

Please provide an email address for your spouse. It can be the same as your own if you share an email account. They will receive a similar request asking them to Sign their forms electronically.

**Chris Taxpayer**

Email Address:

3

mytaxreturn@safesend.com ✕

1

**Enter** date of birth

2

**Check** the box for consent to e-sign

3

**Provide** your spouses email address (if applicable). It can be the same as yours if you have a shared email address.

4

**Click** Continue.

4

**Save and Exit**

Continue



Download Documents



Sign



Pay

Security Questions: #1

Please answer the following:

1. In which of the following states does 'Carol Llion' currently live or own property?

- ☐ Alabama
- ☐ Colorado
- ☐ Tennessee
- ☐ Utah
- ☐ Washington
- ☒ None of the above or I am not familiar with this person

**Answer 3-5 questions and  
click to continue**

Save and Exit

Continue



## Signatures Needed

1. IRS 8879

2. California 8879

3. Illinois 8453

of boxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for my electronic income tax return and, if applicable, my Electronic Funds Withdrawal Consent.

## Taxpayer's PIN: check one box only

☒ I authorize Watson Associates to enter or generate my PIN 13245 as my signature on my tax year 2015 electronically filed income tax return. Enter five digits, but do not enter all zeros.

☐ I will enter my PIN as my signature on my tax year 2015 electronically filed income tax return. Check this box only if you are entering your own and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Next [Click here to sign](#) 1 **10/12/2016**

## Spouse's PIN: check one box only

☒ I authorize Watson Associates to enter or generate my PIN 45321 as my signature on my tax year 2015 electronically filed income tax return. Enter five digits, but do not enter all zeros.

☐ I will enter my PIN as my signature on my tax year 2015 electronically filed income tax return. Check this box only if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Spouse's signature **01/20/2016**

## Practitioner PIN Method Returns Only - continue below

## Part III Certification and Authentication - Practitioner PIN Method Only

ERO's EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN. 87654154321

Do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature for the tax year 2015 electronically filed income tax return for the taxpayer(s) indicated above. I confirm that I am submitting this return in accordance with the requirements of the Practitioner PIN method and Publication 1340, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns.

ERO's signature Watson Associates **01/20/2016**

ERO Must Retain This Form - See Instructions  
Do Not Submit This Form to the IRS Unless Requested To Do So

For Paperwork Reduction

Type Draw

## 1 Enter Your Name

Pat Taxpayer

## 2 Your Signature

Pat Taxpayer

Clear

Cancel

Apply

2

- 1 Select all "Click here to sign" locations
- 2 Select "Apply." Repeat for all signature locations
- 3 Click continue when finished

Save and Exit

3

Continue



Download Documents



Sign



Pay

Payment details are listed below

## Tax Preparation Fee

## Invoice for tax services

## Your Tax Payments

Due Apr 2016 \$22,356

Due Jun 2016 \$27,819

Due Sep 2016 \$22,356

Due Dec 2016 \$27,637

Due 01/01/17

Federal  
\$368

2

Pay

## Payment Information



## Internal Revenue Service

Amount: \$368 Due: 01/01/17

## Pay By Check or Money Order

Your tax preparer has provided  
payment and mailing instructions  
belowDownload Payment  
InstructionsDownload Federal  
voucher due  
01/01/17

or

## Pay Online Now

Click on the button below to make a  
direct payment electronically

Pay Online

3

4

Done

1

Download All  
Payment Vouchers

- 1 **Save** all payment information
- 2 **View** payment options
- 3 **Use** payment vouchers if paying by mail
- 4 **Online payment** may be available but usually incurs additional processing fees

Done