



SafeSend
Returns

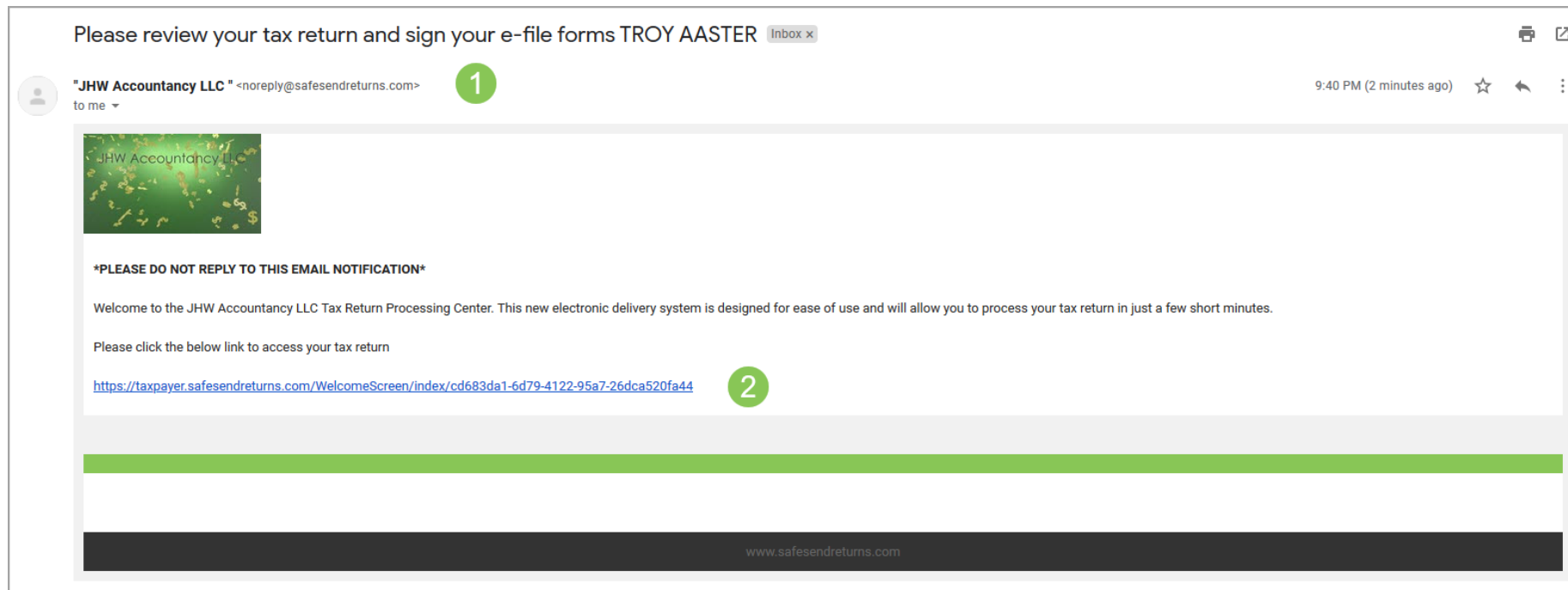
Quick Reference Guide

1040 – Client Experience

safesend.com

Your tax firm will send you a secure email like the one shown below

- ① The email will come from noreply@safesendreturns.com
 - We recommend that you add this email address to your safe sender list to avoid these notifications going into spam
 - Your firm's name will appear in front of the email address
 - Your firm's logo may appear in the body of the email
 - Your name will appear in the subject line of the email
- ② Click on the link in the email



1

Click the "Click Here to Get Started" tab to continue

AM Accounting

Contact Person

2019 Tax Return

DAN LLION

Prepared by

AM Accounting

3537 E Overland Rd
Meridian ID 83642

Click Here to Get
Started

- 1 Insert the last four digits of your SSN
- 2 Click "Continue"

Authentication

DAN LLION

Please enter the last four digits of your Social Security Number:
(We use the last four digits to verify your identity)

1

Continue

2

- 1 Click "Request Access Code"
- 2 You will receive an email or text notification with an Access Code
 - Copy the Access Code and return to the page below
- 3 Paste or type the Access Code into the requested field
- 4 Click "Continue"

Authentication

Access Code Required

Please select "Request Access Code" and we will send you a one-time expiring access code to your email.

Request Access Code

1

Enter access code here:

59091629

3

(This code will expire in 20 minutes)

4

Continue

Code for TROY AASTER Inbox x

2



"JHW Accountancy LLC" <noreply@safesendreturns.com>
to me ▾

Your one time code is 75508791

↩ Reply

➡ Forward

- 1 The left panel shows a summary of refunds and payments due.
- 2 Click "Click Here to Begin" to continue

AM Accounting

Tax year: 2019Contact PersonDAN LLION

1SummaryReviewSignPay

2019 Tax Return

Refunds

Arizona		\$4,190
Total		\$4,190

Payments Due

Federal		\$35,229
California		\$5,006
California		\$800
Total		\$41,035

2020 Estimated Payments

Q1

Federal		\$9,416
Arizona		\$1,453
California		\$1,209
Total		\$12,078

Q2

Federal		\$9,416
Arizona		\$1,453
California		\$1,209
Total		\$12,078

Welcome DAN LLION

Your 2019 tax returns are ready!

Please follow these easy steps so your taxes can be filed.

Review Documents

Sign Documents

Make Payments

2Click Here to Begin

- 1 You will see a message from the preparer
- 2 Click "Continue"

AM Accounting

Tax year: 2019

Contact Person

DAN LLION

Summary

Review

Sign

Pay

A message from AM Accounting

Set Default Test

1

Back

2

Continue

- 1 Review your tax documents
- 2 Forward a copy of your return, if needed
- 3 Click "Continue"

AM Accounting

Tax year: 2019Contact PersonDAN LLION

Summary

Review

Sign

Pay

Review Tax Documents - Tax Returns

Download Tax Document(s)

1

Tax Returns

KBA1 01/29/2020 5:00 PM

1040

Federal Return Summary

2019

Name

Taxpayer Identification Number

DAN LLION

362-56-3215

Tax Form

1040

Filing Status

SGL

Tax Method Used

Tax Computation Wrk

Dependents

Income

Tax Computation

Salaries & wages

100,000

Regular tax

29,775

Taxable interest income

35,500

Alternative minimum tax

Tax exempt interest

Excess advance premium tax credit

Dividend income

Total tax before credits

29,775

Qualified dividends

Child and dependent care credit

Taxable state/local refunds

Education credits

Alimony received

Other credits

Business income/loss

31,584

Total credits

Capital gain/loss

Tax after credits

29,775

Other gain/loss (Form 4797)

Self-employment tax

4,463

Taxable IRA distributions

2,000

Additional tax on IRAs, etc.

Taxable pension distributions

Other taxes

Back

2Forward a copy of my tax documents

3Continue

- 1 Select to E-Sign OR
- 2 Select to Manually Sign

AM Accounting

Tax year: 2019

Contact Person

DAN LLION

Summary

Review

Sign

Pay

Sign Tax Documents

Select the method you would like to use to sign your documents

1

e-Sign

Sign electronically from this website

2

Manually Sign

Print, Sign and Return the forms

Back

- 1 Enter your date of birth
- 2 Check the box to consent to e-signing
- 3 Provide your spouse's email address if applicable
 - It can be the same as yours
- 4 Click "Continue"



Summary



Review



Sign



Pay

Sign Tax Documents Electronically

Before signing, you will need to verify your identity by answering a few short questions about yourself.

Please verify/enter the information requested and click continue to begin

Your Date of Birth:

1 ▼

4 ▼

1970 ▼

1

2

☒ I have reviewed my tax returns and consent to e-Sign

Spouse's Signature Required

Please provide an email address for your spouse. It may 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.

Spouse's Name: JILL ANDERSON

Email Address: annie.mcgoldrick@safesend.cc

3

4

Back

Continue

- 1 Answer 3 questions correctly
 - You may see up to 5 questions
- 2 Click "Continue"



Summary



Review



Sign



Pay

Security Questions

IRS required Disclosure. Please verify your identity by answering the following questions. These questions are generated from a third party's database. This process does not access or impact your credit report and the third party does not have access to your taxpayer information. Please answer the following.

1. Which of the following boats or watercrafts have you owned?

- ☐ 14 ft. Glass Master 04016f
- ☐ 19 ft. Stingray 190 Lx
- ☐ 20 ft. Smoker Craft Inc 20hw5
- ☐ 22 ft. Boston Whaler 220da
- ☐ None of the above

1

2

Continue

- 1 Select the "Start" or "Next" flag and click each signature box
- 2 Click "Apply" and repeat for all signature locations
- 3 Click "Continue" when finished

AM Accounting

Tax year: 2019 Contact Person DAN LLION

Summary Review Sign Pay

1 of 5 Automatic Zoom

Tax Document

- 114
- IRS 8879
- AZ-8879
- California 8879
- 8453-LLC

1. Owner last name or entity's legal name
LLION

2. Owner first name
DAN

3. Owner M. I.

4. Spouse last name (if jointly filing FBAR - see instructions below)

5. Spouse first name

6. Spouse M. I.

I/we declare that I/we have provided information concerning 1 (enter number of accounts) foreign bank and financial account(s) for the filing year ending December 31, 2019 to the preparer listed in Part II; that this information is to the best of my/our knowledge true, correct, and complete; that I/we authorize the preparer listed in Part II to complete and submit to the Financial Crimes Enforcement Network (FinCEN) a Report of Foreign Bank and Financial Accounts (FBAR) based on the information that I/we have provided; and that I/we authorize the preparer listed in Part II to receive information from FinCEN, answer inquiries and resolve issues relating to this submission. I/we acknowledge that, notwithstanding this declaration, it is my/our legal responsibility, not that of the preparer listed in Part II, to timely file an FBAR if required by law to do so.

7. Owner signature (Authorized representative if entity)
Signature

8. Date
01/26/2021
MM/DD/YYYY

9. Owner or entity TIN
999-99-9991

10. TIN type
a EIN
b SSN/ITIN
c Foreign

11. Spouse signature

12. Date
08/08/2020
MM/DD/YYYY

13. Spouse TIN
999-99-9992

14. TIN type
a EIN
b SSN/ITIN
c Foreign

Part II Individual or Entity Authorized to File FBAR on behalf of Persons who have an obligation to file.

15. Preparer last name

16. Preparer first name

17. Preparer M.I.

18. Preparer PTIN

19. Address

20. City

21. State

22. ZIP/postal code

23. Country code

24. Preparer's (item 15) employer's (Entity) name

25. Employer EIN

26. Preparer's signature
Signature

Instructions for completing the FBAR Signature Authorization record
This is a fill and print form using Adobe Reader.

Back Continue

Add Signature

Type Draw

Name

DAN LLION

Draw Your Signature

Clear

DAN LLION

Cancel

Apply

- 1 View Payment Options
- 2 Download and Pay Manually
- 3 Pay Online

JHW Accountancy

Tax year: 2019 Contact Person TROY AASTER

Summary

Review

Sign

Pay

Payment details are listed below

Tax Payments

Select to see details

2019 Tax Payments

Due Oct 2020 \$57,266

2020 Estimated Payments

Due Apr 2020	\$912
Due Jun 2020	\$912
Due Jul 2020	\$28,140
Due Sep 2020	\$14,982
Due Jan 2021	\$14,982

Preparation Fee

Choice for tax services

☒ Email me reminder 10 days before payment is due

Due 10/15/20

Federal \$52,820

Pay

Add payment details

Due 10/15/20

Arizona \$3,646

Pay

Add payment details

Due 10/15/20

California \$800

Pay

Add payment details

Payment Information

Download Filing Instructions

Internal Revenue Service

Amount: \$18,927

Due: 01/15/2021

Pay By Check or Money Order

Select "Download Filing Instructions" above to review your payment and mailing instructions. Select the button below to download your payment voucher.

Download Voucher

or

Pay Online Now

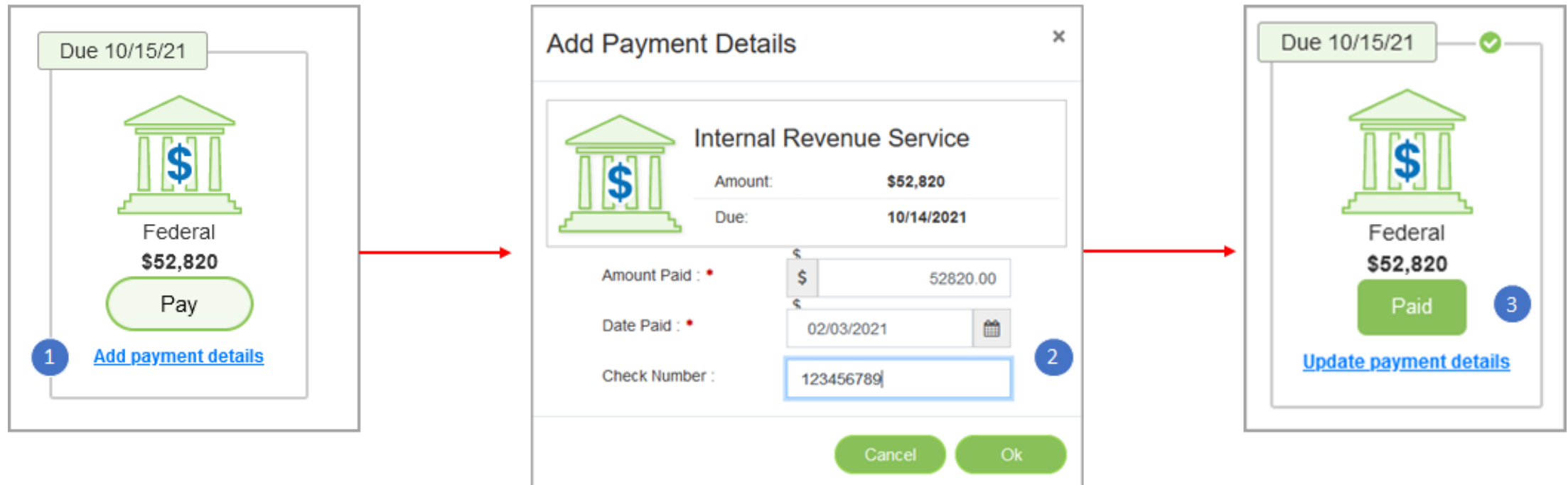
Select "Download Filing Instructions" above to review your payment instructions. Select "Pay Online" below to make your payment.

Pay Online

Done

Record your payment information

- 1 Select "Add payment details"
- 2 Enter payment information
- 3 Payment will be marked as "Paid"



Questions?

Contact our Support team at
support@safesend.com or 855-818-3552.