



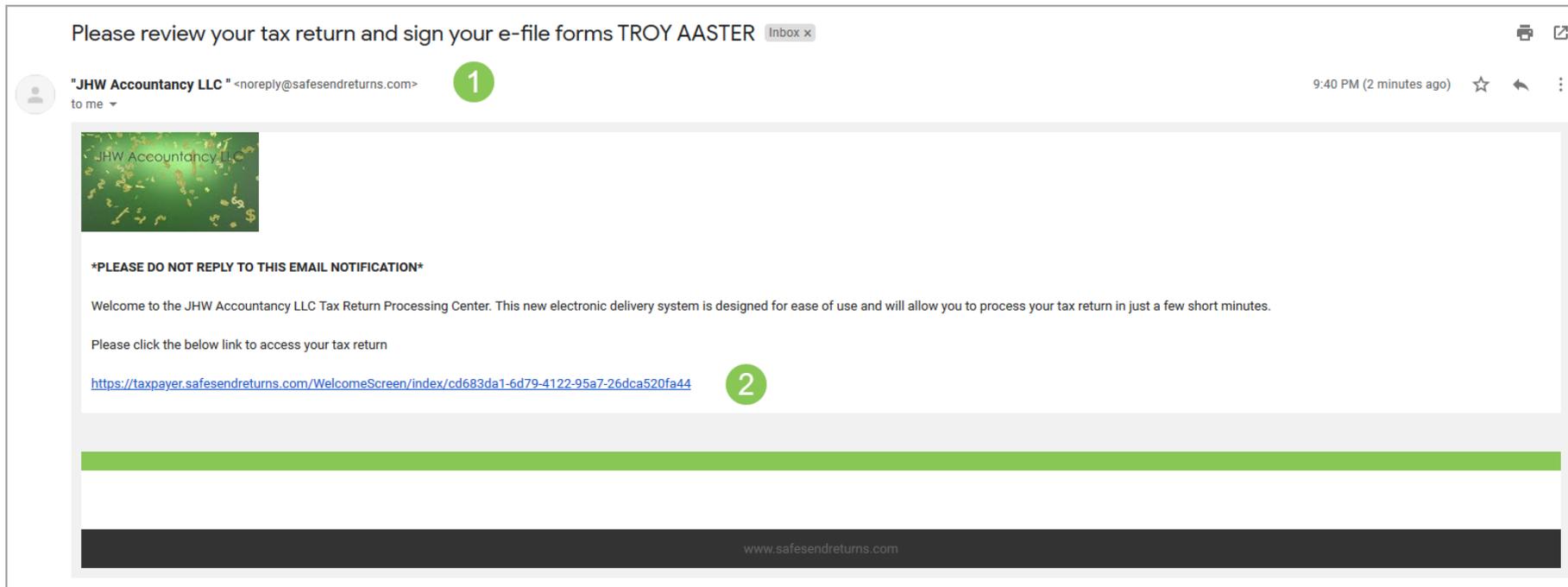
SafeSend
Returns

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

2019 Tax Return

DAN LLION

Click Here to Get Started

Prepared by

AM Accounting

3537 E Overland Rd
Meridian ID 83642

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)

0535

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: 2019 Contact Person DAN LLION

1 Summary Review Sign Pay

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

2

Click Here to Begin

1 You will see a message from the preparer

2 Click "Continue"



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: 2019 Contact Person DAN LLION ▼

Review Tax Documents - Tax Returns

[Download Tax Document\(s\)](#)

☰
1

 << < > >>

1
of 72
🔍 🔍
Automatic Zoom ▼
🔍

Tax Returns

KBA1 01/29/2020 5:00 PM

1040	Federal Return Summary	2019	
Name DAN LLION		Taxpayer Identification Number 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

2
Forward a copy of my tax documents

Continue

3

- 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

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:

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 <input checked="" type="checkbox"/> 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 <input checked="" type="checkbox"/> 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 <i>Dan</i>

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

Back Continue

Add Signature

Type Draw

Name
DAN LLION

Draw Your Signature Clear

DAN LLION

Cancel Apply

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](#)

Pay Online Now

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

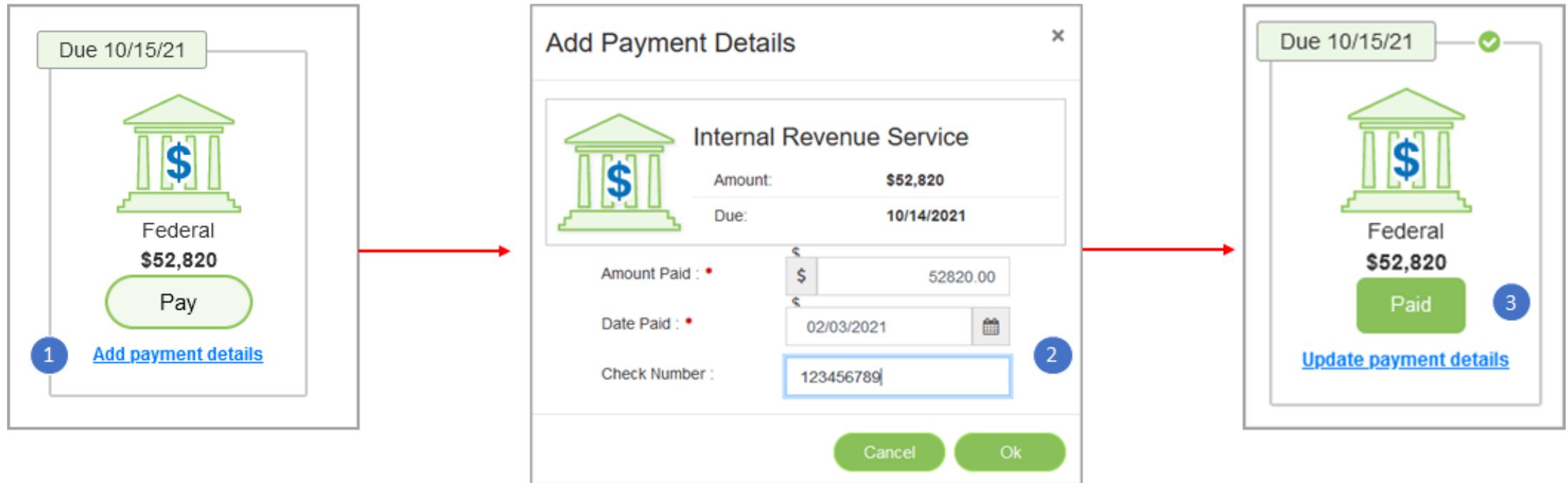
[Pay Online](#)

Done

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

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.