

SafeSend Returns®

Automate the Last Mile of the Tax Engagement Process –
Assembly, Delivery, and E-Signing of Prepared Returns



More than
1,000,000
Tax Returns Delivered



SafeSend Returns is trusted by large, medium, and small firms in the profession to reduce the labor-intensive work in the “last mile” of tax prep. With SafeSend Returns, you can reclaim some of your precious time spent by automating manual tasks.



SafeSend Returns is fully compatible with CCH Axcess™ Tax, ProSystem fx® Tax, Thomson Reuters GoSystem® Tax RS, Thomson Reuters UltraTax CS®, and Intuit Lacerte®.



“Cutting time on assembly and getting electronic signatures on our 1040s. It has been a game changer.”

– Melody Young,
BMSS, LLC

Eliminate the Labor-Intensive Tasks of Assembly, Delivery & E-Signing

With SafeSend Returns, you have the power to redefine your firm’s entire process surrounding the “last mile” of tax preparation – assembly, delivery, and e-signing. In one fell swoop, you will banish the days of a harried, stressed-out staff scrambling to sort out a mountain of incomplete and unorganized returns and round-up signed 8879s!

- Streamlines the process of assembling, delivering, and e-signing
- Eliminates blind spots, allowing you to follow the tax return through every step
- Saves you time, money, and frustration
- Incorporates the billing process, so you don’t have to chase tax prep payments
- Intuitive Client Interface that walks your client through the process, step-by-step



“We have recommended SafeSend Returns to many firms at several peer gatherings such as Boomer and Rainmaker Academy. We probably tell them more than they really want to know when they ask us about our digital signature and tax return policy.”

– Jamie Luebbering,
Wilson Toellner CPA

SafeSend Returns Makes the Last Mile of Tax Prep Easy

SafeSend Returns is not only beneficial to your staff and firm, but you can rest easy knowing that your clients will have no problem transitioning to this innovative solution. SafeSend Returns presents information to the client in a logical, step-by-step process that is intuitive – just like the tax professional was there in-person!

Organize the Prepared Return PDF

SafeSend Returns automatically groups, assembles, and prepares the transmittals, e-file authorization forms, payment vouchers, tax returns, K-1s and the invoice for electronic delivery and presentation.

One-Click Tax Return Delivery

With a single click of the mouse, the tax return is securely delivered to the client and presented with clear, easy-to-follow instructions.

Client Review & E-Sign

Once received, the client can quickly and easily review, e-sign, and return their e-file forms with an integrated payment feature that eliminates the need to spend time on payment collection.

Tracking & Reporting

SafeSend Returns reporting feature keeps all information for each client right at your fingertips. Allowing you to track each return every step of the way.

Lyon CPA & Associates Tax year: 2019 Contact Person TROY AASTER

Summary Review Sign Pay

2019 Tax Return

Refunds	
California	\$1,782
Total	\$1,782
Payments Due	
Federal	\$52,820
Alaska	\$500
Arizona	\$3,646
California	\$1,700
Total	\$58,666

2020 Estimated Payments

Q1	
Federal	\$14,070
Arizona	\$912
California	\$3,249
Total	\$18,231
Q2	
Federal	\$14,070
Arizona	\$912
California	\$3,249
Total	\$18,231
Q3	
Federal	\$14,070
Arizona	\$912

Welcome TROY AASTER
Your 2019 tax returns are ready!

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

Review Documents Sign Documents Make Payments

Click Here to Begin

SafeSend Returns Client User Interface



About SafeSend

SafeSend's mission is to automate the tax and accounting profession with innovative, emerging technologies that help practitioners work more efficiently and serve their clients better. Progressive accounting firms and tax professionals rely on our unique and robust solutions to make their lives easier and their work more enjoyable.

SafeSend offers several foundational technology solutions for the tax and accounting profession. Our flagship offering, **SafeSend Returns®** is a multi-year winner of the CPA Practice Advisor Technology Innovation Award and has redefined the way accounting firms digitally assemble, securely deliver, and quickly capture e-signatures from clients for completed tax return packages. Additional tools we offer include, **TicTie Calculate®**, an Adobe® Acrobat® plug-in for accounting professionals, and **SafeSend Exchange™**, the secure, bi-directional file exchange system.

Visit safesend.com to learn more about our digital solutions. ●●●●

Take Your Firm to the Next Level

SafeSend Returns is a revolutionary tax return assembly and delivery process in the market. An entirely unique solution that will leave you wondering, why has no one thought of this before?



Cost Effective

Firms lose thousands of dollars each year sending paper returns. With SafeSend Returns automation, you will save money by reducing the man hours and save the cost of supplies like paper, toner, and postage associated with mailing paper returns!



Time Saving

Automated tax return assembly and delivery can save your firm precious hours each tax season. What will you do with all the extra time SafeSend Returns affords you?



Happier Employees

Comprehensive reporting, tracking, automated K-1 distribution and Form 8879 e-sign means your staff is not hurried. Less stress means more freedom to grow with higher-level projects.



Best Client Experience

Clients love the SafeSend Returns ease of use and Form 8879 e-sign, but quarterly reminders for payment vouchers and electronic K-1s sent to shareholders/partners can make them clients for life.



Schedule a Demo

SafeSend Returns is a multi-year winner of the CPA Practice Advisor Technology Innovation Award. It eliminates the manual, labor-intensive elements many tax departments experience producing client-ready tax returns.

See what all the fuss is about by scheduling a demo at safesend.com

