SafeSend Suite

Anchored by SafeSend Returns, the SafeSend Suite is an entirely unique and powerful platform that helps firms reduce work by automating every client touchpoint across the tax engagement.

Harness the Power of Automation with the SafeSend Suite

The SafeSend Suite workflow automation platform offers powerful functionality to tax and accounting professionals to address every client touch point across the tax engagement. Automate the manual tasks often associated with the back and forth of client communication through each season of the tax year!

- Engagement Letters – SafeSend Signatures™

- Client Organizers – SafeSend Organizers™

- Assembly & Delivery – SafeSend Returns®

- Secure File Exchange – SafeSend Exchange®

- Extensions – SafeSend Extensions™

SafeSend **Signatures**

SafeSend **Organizers**

SafeSend **Returns**

SafeSend **Exchange**

SafeSend **Extensions**

At the core of the suite, **SafeSend Returns, a multi-year winner of the CPA Practice Advisor Technology Innovation Award**, eliminates the manual, labor-intensive tasks many tax departments experience during the assembly and delivery of client-ready tax returns.
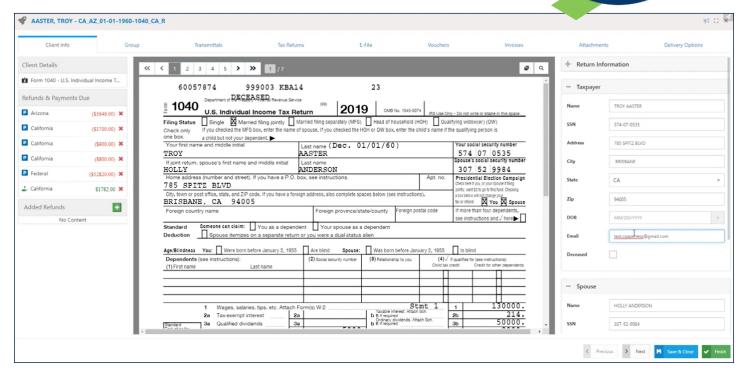
Visit the SafeSend Suite page of our website to learn more about automating your tax engagement workflow and schedule a demo!

SafeSend Returns:
Assembly, Delivery & E-Signing of Prepared Returns

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

2016 / 2017 / 2020 / 2022
CPA Practice Advisor Tax & Accounting
**Technology Innovation
Award Winner**

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! Plus, your clients can complete everything on any device, from anywhere in the world.

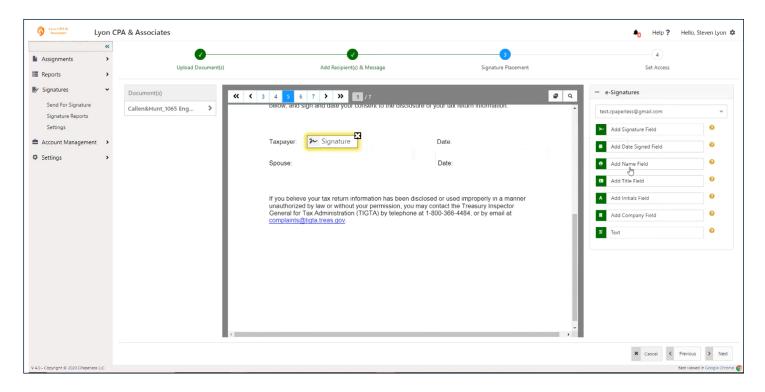> **"You guys ROCK! Your support team, your development team, your products, everything. Thank you. It's a breath of fresh air with all of the different vendors I deal with."**
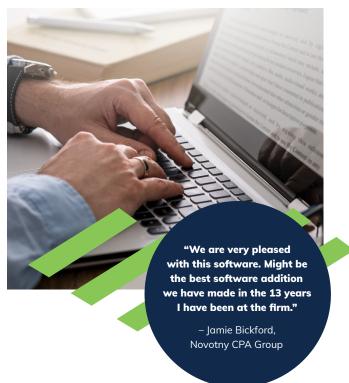>
> – Merinda Bratton, IT at Grimbleby Coleman CPAs

SafeSend Signatures:
Extend E-Signing Beyond the Tax Package

SafeSend Signatures extends your e-sign capabilities beyond tax packages to all document types. It is designed for sending one-off documents such as engagement letters, consent forms, or any other document requiring a signature.
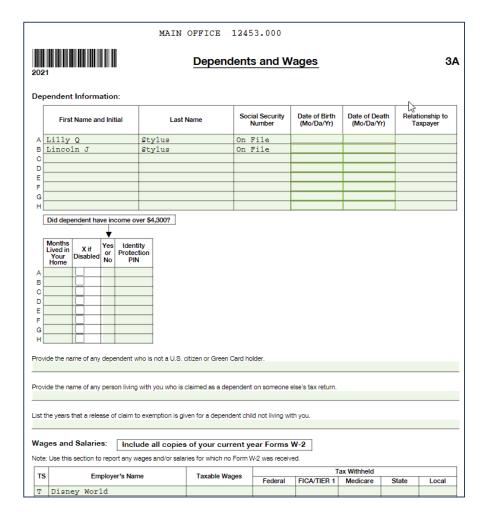
SafeSend Signatures also supports bulk engagement letters and other bulk e-signature needs with batch processing and mail merge capabilities.

You can streamline reporting and tracking of documents that require a signature and, since SafeSend Signatures is part of the SafeSend Suite, offer staff and clients a familiar and intuitive experience. ●●●●

"We are very pleased with this software. Might be the best software addition we have made in the 13 years I have been at the firm."

– Jamie Bickford,
Novotny CPA Group

SafeSend Organizers:
Simplify Source Document Gathering

Our simple tool converts static PDF organizers from your tax compliance software to a digital, fillable form as well as lets you send engagement letters for signature and gather source documents - all in one easy-to-use tool for your clients.

MAIN OFFICE 12453.000

Dependents and Wages   3A

2021

Dependent Information:

	First Name and Initial	Last Name	Social Security Number	Date of Birth (Mo/Da/Yr)	Date of Death (Mo/Da/Yr)	Relationship to Taxpayer
A	Lilly Q	Stylus	On File			
B	Lincoln J	Stylus	On File			
C						
D						
E						
F						
G						
H						

Did dependent have income over $4,300?

	Months Lived in Your Home	X if Disabled	Yes or No	Identity Protection PIN
A				
B				
C				
D				
E				
F				
G				
H				

Provide the name of any dependent who is not a U.S. citizen or Green Card holder.

Provide the name of any person living with you who is claimed as a dependent on someone else's tax return.

List the years that a release of claim to exemption is given for a dependent child not living with you.

Wages and Salaries: Include all copies of your current year Forms W-2

Note: Use this section to report any wages and/or salaries for which no Form W-2 was received.

TS	Employer's Name	Taxable Wages	Tax Withheld				
			Federal	FICA/TIER 1	Medicare	State	Local
T	Disney World						

> "We felt very fortunate to have had this system in place this year as it greatly enhanced our ability to work remotely."
>
> – Peter Ordelheide, JDS Professional Group

Eliminate Client Touchpoint Frustration

With more than 60 percent of the Top 400 accounting firms using SafeSend Returns, the core of the SafeSend Suite, we have heard from many tax departments about the frustration felt by staff at every step of the tax engagement. The SafeSend Suite automates every client touchpoint to address those pain points!
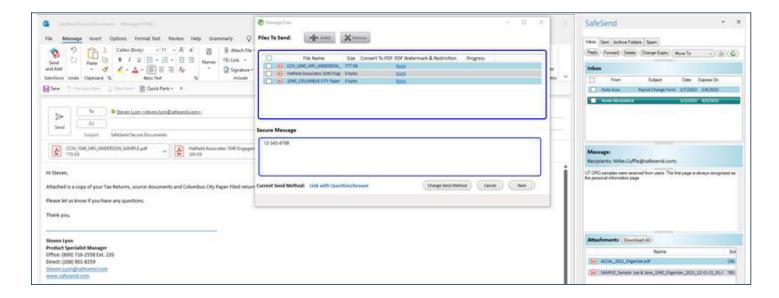
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SafeSend Exchange:
No. 1 Trusted Secure File Transfer Solution by the Tax & Accounting Profession

Now a part of the SafeSend Suite, SafeSend Exchange combines the best of secure file sharing, client portal capabilities, and encrypted PDFs in a single solution, accessed from within Microsoft® Outlook®.

SafeSend Exchange is relied upon by thousands of accounting firms. SafeSend Exchange has replaced traditional client portals that have proven to be difficult to implement and not widely adopted by clients.

Inundated with client requests all year long? Use SafeSend Exchange to transfer sensitive information and documents to clients without ever having to reset a password!

SafeSend Extensions:
Allows Firms to Digitally Send Their Clients an Extension Package Quickly and Efficiently

SafeSend Extensions automates the delivery of documents for review, collects e-signatures if required, provides payment options for vouchers by various taxing authorities, and allows staff to track where clients are in the extension package process. Plus, firms and clients appreciate the standard experience across the SafeSend Suite platform, making adoption of the process easy.

Invest in Innovation
Simple, Transparent Pricing

Our simple, tiered pricing model gives you instant access to modules and features within the SafeSend Suite without any additional cost beyond the per-return fee.

SafeSend Suite Pricing Tiers

	Suite Essential	Suite Preferred
SafeSend Returns	$13 - $17 per return	$14 - $20 per return
— SafeSend Signatures	Unlimited	Unlimited
— SafeSend Extensions	Unlimited	Unlimited
— SafeSend Organizers	Not Included	Unlimited
— SafeSend Exchange	Not Included	Unlimited

Volume Discounts

Number of Returns	Suite Essential	Suite Preferred
10,000+	$13.00	$14.00
2,500 — 9,999	$14.00	$15.50
1,000 — 2,499	$15.00	$17.00
500 — 999	$16.00	$18.50
Under 500	$17.00	$20.00

> "We've been centralizing processes for the last five years and as we centralize them, the SafeSend Suite will become the gold standard."
>
> – Russell Goldberg, Partner, Withum

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It Is Time to Make the Tax Engagement Faster, Easier, and More Enjoyable!

Tax Engagement Life Cycle

- Engagement Letters
- Assembly, Delivery, & E-Signing
- File Extensions
- File Extensions
- Preparation & Review
- Organizers/Gathering Source Documents

BUSY SEASON

SafeSend Returns — Automate Last-Mile of Tax Prep

SafeSend Extensions — File Extensions

SafeSend Signatures — E-Sign Any Document

SafeSend Organizers — Electronically-Fillable PDF

SafeSend Exchange — Secure-File Delivery

Address client needs all year long!

SafeSend Returns

- Enjoy 7 years of tax return storage
- Fill client copy requests in one click (no password needed)
- Distribute K-1s securely
- Send voucher & estimate payment reminders
- Receive e-signed 8879s quickly from clients

SafeSend Exchange

- Send encrypted tax documents to banks and more via email
- Share large files through a client portal
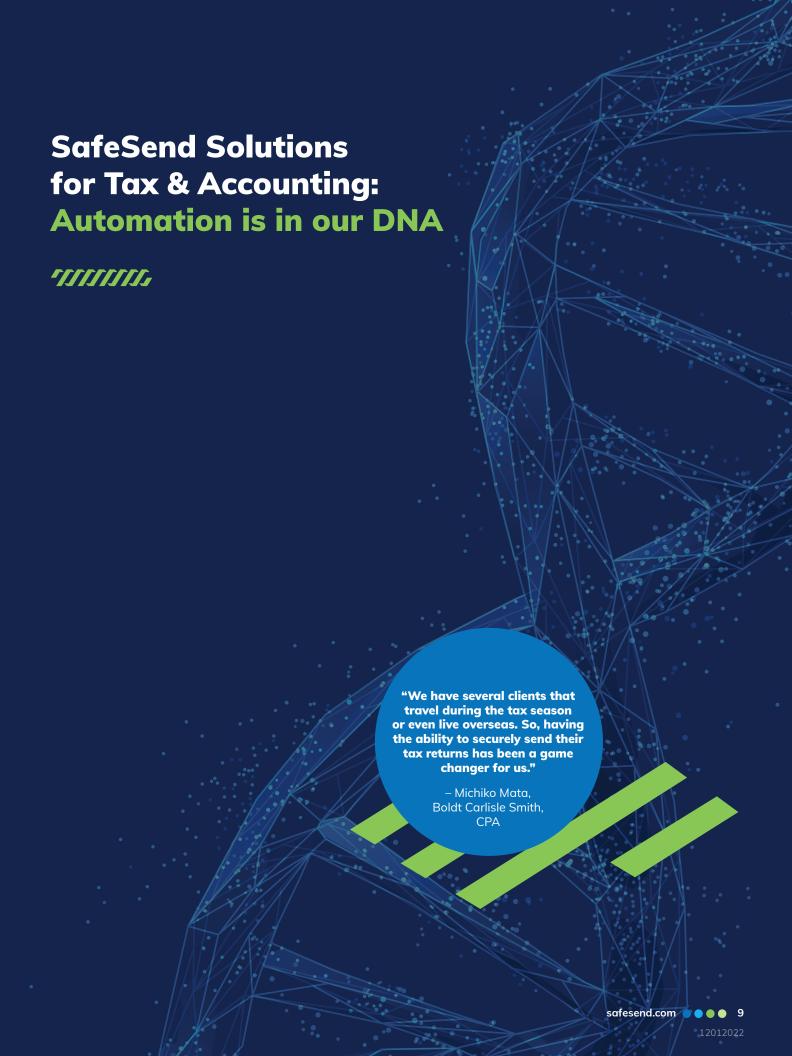- Eliminate the chore of remembering user names and passwords

Four-Time Innovation Technology Award Winner!

SafeSend Returns, was honored with its fourth Tax & Accounting Technology Innovation Award presented by *CPA Practice Advisor*.

"We are honored to win this award," said Steve Dusablon, Co-founder and Chief Innovation Officer. "To be recognized by CPA Practice Advisor four times is truly humbling. SafeSend Returns is our flagship solution and the core around which we built the SafeSend Suite workflow automation platform. The new enhancements for which SafeSend Returns was awarded are a direct result of our commitment to listening to our customers and how we develop tools that can help firms increase efficiency and provide the best experience to their clients."

"As new workflows and technologies continue to advance the efficiency of firms, this award recognizes the passion our Product and Engineering teams have put into developing automation tools to help alleviate our customers' pain points and help them provide the best possible experience for their clients," commented Rahul Chandran, Chief Technology Officer.

SafeSend Solutions
for Tax & Accounting:
Automation is in our DNA

> **"We have several clients that travel during the tax season or even live overseas. So, having the ability to securely send their tax returns has been a game changer for us."**
>
> – Michiko Mata,
> Boldt Carlisle Smith,
> CPA

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. Additionally, we offer **TicTie Calculate®**, an Adobe® Acrobat® plug-in for accounting professionals.

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

SafeSend

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