

SafeSend**ONE**

UNRIVALED CLIENT EXPERIENCE

The End-to-End Solution for Tax and Accounting Firms

SafeSend One™ automates the entire tax process, offering firms an all-in-one solution to provide an unrivaled client experience. A secure and easy-to-use product for engagement letters, file transfers, organizers, eSignatures, and tax return assembly and delivery, now with a new and innovative AI-driven gathering capability.

 **SafeSend**
Part of Thomson Reuters

SafeSend**ONE**

Automate the Entire Tax Process

Save your firm time and money by eliminating those time-consuming manual tasks, like tedious back-and-forth client communications, data entry, and document sourcing.

Visit the [SafeSend One page](#) of our website to learn more about automating your tax engagement workflow and to schedule a demo.

- ✓ **Tax Returns**
- ✓ **eSignatures**
- ✓ **Secure File Transfer**
- ✓ **Organizers**
- ✓ **Client Portal**
- ✓ **Next Gen Gather AI**



Invest in Innovation

Simple, Transparent Pricing.

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

Visit our [pricing page](#) at safesend.com to learn more.

Tax Returns



Assembly, Delivery, & eSigning of Prepared Returns

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

Your clients will love the experience, too. The entire platform is seamless with a similar look and intuitive feel throughout. Plus, they can take care of everything on any device, and from anywhere in the world.

2023 TAX RETURN

Refunds	
Georgia	\$41,983
Total	\$41,983

Overpayments Applied

Georgia	\$400
Total	\$400

Payments Due

Federal	\$502,528
Alabama	\$49,204
Total	\$551,732.00

2023 ESTIMATED PAYMENTS

Q1	
Federal	\$140,000
Alabama	\$13,001

Summary Review Sign Pay

Hi. Do you need help?

Hello, JACK ANDERSON
Your 2023 Tax Return is ready!

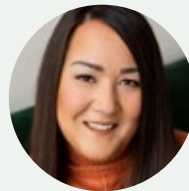
Review Documents Sign Documents Make Payments

Get Started



Joe Montgomery
Montgomery & Co. CPAs

"It used to take us 20 minutes to deliver a return. With SafeSend One, that dropped to 5 minutes. My team loves me for switching to SafeSend."



Michiko Mata
Boldt Carlisle + Smith, LLC

"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."



Merinda Bratton
Grimbleby Coleman Advisors & Accountants

"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."

eSignatures



Extend eSigning Beyond the Tax Package

Digitally sign any document with SafeSend One's Signatures feature. Whether it's part of a return or it's a one-off material like an engagement letter or consent form, you can eSign any document.

The image displays two screenshots of the SafeSend ONE eSignature software interface. The top screenshot shows the 'Add Signers' step, where a document titled 'Engagement Let...' is being reviewed. The interface includes a sidebar menu with options like 'New Request', 'Draft', 'Delivered', 'Archive', 'Locked', 'Recycle Bin', and 'Settings'. The document content is visible, showing a section for 'Signature' and 'Date'. The bottom screenshot shows the 'Review & Send' step, where recipient information is entered. The 'Recipients Information' section includes fields for 'Sender' (Alisa Lawrence), 'Recipients' (macyvough@gmail.com and somuathenderson@gmail.com), and 'Message Configuration' (Sign Role, Subject, Message). The interface also features a progress bar at the top and a 'Next >' button at the bottom.

The solution also **supports bulk eSignature needs** – like numerous engagement letters, for example – with batch processing and mail-merge capabilities. It even provides streamlined reporting and tracking of client completion status.



Jamie Bickford
Novotny CPA Group

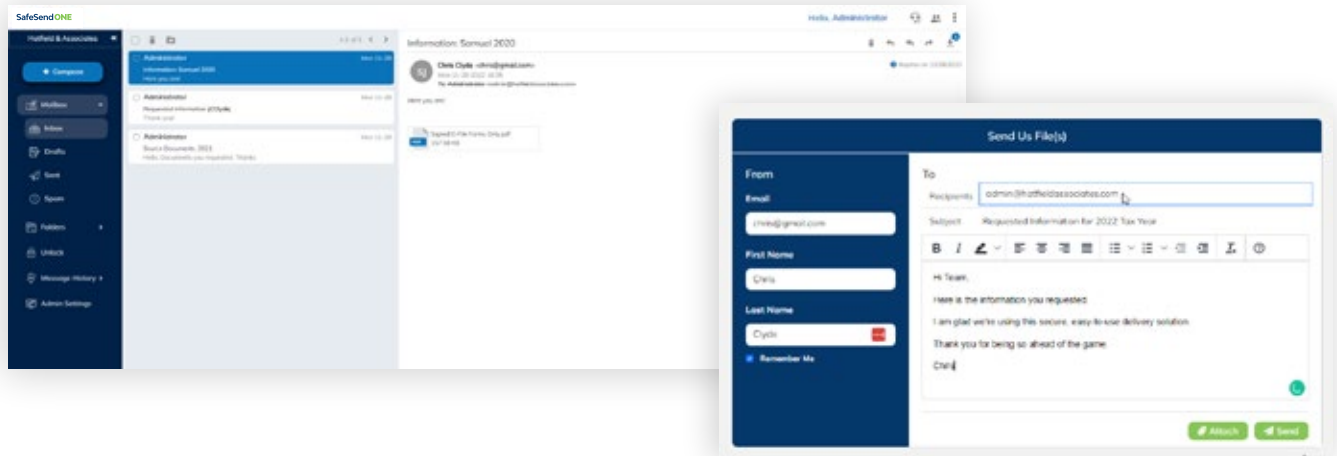
“We are very pleased with this software. Might be the **best software addition** we have made in the 13 years I have been at the firm.”

Secure File Transfer



#1 Trusted Document Exchange Solution By The Tax & Accounting Profession

Share files safely and soundly with SafeSend One's Secure File Transfer feature. The tool allows you to **securely exchange any document** through SafeSend One via Microsoft® Outlook® web add-in.

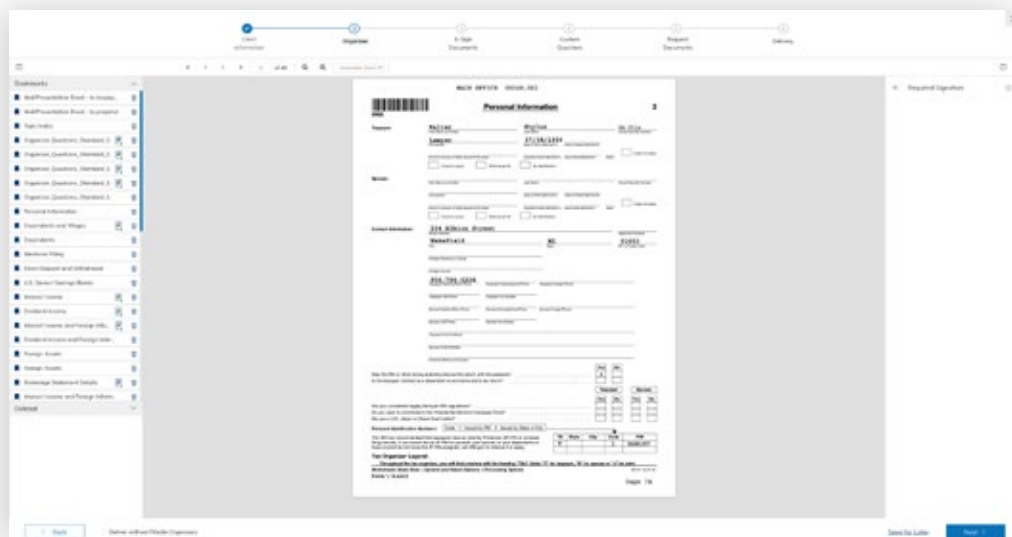


Organizers



Go Digital And Make Client Organization Easy

Convert **static PDF** client organizers into digital, fillable forms with SafeSend One. You can also send engagement letters and client-specific questionnaires.



Client Portal



A Comprehensive, Easy-to-Use Taxpayer Dashboard

Inundated with client requests all year long? You won't be once you switch to SafeSend One. The platform's Client Portal **keeps documents altogether** in the same place with easy access, including data and materials from the previous year. SafeSend One makes clients' entire tax journey free of log-in credentials, too, meaning you'll never hear about forgotten usernames or passwords again.



🏆 2016 🏆 2017 🏆 2020 🏆 2022

Four-Time Innovation Technology Award Winner!

Presented by CPA Practice Advisor.



Steve Dusablon
Co-founder and Chief Innovation Officer

"The new enhancements for which SafeSend 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."



Rahul Chandran
Chief Technology Officer

"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."

Next Gen Gather AI



Simplify Intake And Source Document Gathering

Next Gen Gather AI uses **cutting-edge artificial intelligence** to do many of the heavy-lift, time-consuming intake tasks for you. The tool automatically generates document request lists, and recognizes and organizes client-uploaded materials, eliminating the back-and-forth between firm and taxpayer. It gives you real-time visibility into client completion status and sends notifications to them about deadlines, keeping things on track.

Client	Client ID	Request	Due Date	Status	Assigned To	Created	Completed	Download	Actions
Stylus...	2023	James M. Hatfield	John Kim	08/27/2023	100%	1,838	Download
Stylus...	2023	James M. Hatfield	Steven L.	08/27/2023	100%	1,838	Download
Stylus...	2023	James M. Hatfield	Steven L.	08/24/2023	100%	1,838	Download
Stylus...	2023	James M. Hatfield	Steven L.	08/28/2023	100%	1,838	Download
Stylus...	2023	James M. Hatfield	Steven L.	08/25/2023	100%	1,838	Download
Stylus...	2023	James M. Hatfield	Steven L.	08/24/2023	100%	1,838	Download
Stylus...	2023	Steven L. Hatfield	Steven L.	08/29/2023	100%	1,838	Download
Stylus...	2023	Steven L. Hatfield	Steven L.	08/29/2023	100%	1,838	Download
Stylus...	2023	Steven L. Hatfield	Steven L.	08/29/2023	100%	1,838	Download
Stylus...	2023	Steven L. Hatfield	Steven L.	08/29/2023	100%	1,838	Download

Gather AI does all of that, and **all in the same place** as the rest of SafeSend One's features, keeping a consistent and intuitive user experience throughout.

Eliminate Client Touchpoint Frustration

Over 60% of the Top 400 accounting firms use SafeSend One's award-winning automation to provide an unrivaled client experience.



Peter Ordelheide
JDS Professional Group

*"We felt very fortunate to have had this system in place this year as it greatly enhanced our **ability to work remotely.**"*

About SafeSend®

SafeSend offers award-winning automation technology for tax and accounting firms to provide an unrivaled client experience. SafeSend One is a single, secure solution for engagement letters, fillable organizers, source document gathering, file exchange, extensions, tax return assembly, delivery, eSign, and electronic K-1 distribution. Thousands of firms save an average of \$12K for every 1K returns delivered via SafeSend®.

This end-to-end tax workflow equips firms to serve their clients with a guided and intuitive experience across all touchpoints, including automated reminders, online payment options, tax return summary—and more—all in one place. SafeSend One currently supports CCH Axcess™ and ProSystem fx®, Thomson Reuters UltraTax CS® and GoSystem® Tax RS, and Intuit Lacerte®.

6.6M

Total tax returns delivered

96%

eSignatures / e-file forms completed within 15 Days

97%

KBA success rate on 1040 tax returns