

6 WAYS TO AUTOMATE CLIENT TOUCHPOINTS

With the SafeSend Suite



1

COLLECT SIGNATURES ON ANY DOCUMENT

SafeSend Signatures extends e-sign capabilities beyond the tax return. Receive signed engagement letters and more!



2

SEND ELECTRONICALLY-FILLABLE ORGANIZERS

SafeSend Organizers allows you to convert your PDF organizer into a fillable document and send off to your client with the engagement letter.



3

SECURELY COLLECT SOURCE DOCUMENTS

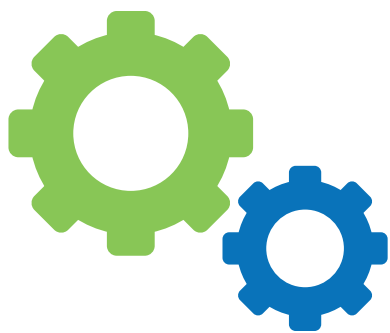
SafeSend Exchange lets you securely collect client source documents & TicTie Calculate lets you prepare PDF workpapers for tax preparation.



4

FILE EXTENSIONS

Coming in 2021, **SafeSend Extensions** will streamline the extension filing process during tax return preparation.



5

AUTOMATE THE "LAST MILE" OF TAX PREP

SafeSend Returns is redefining the way firms assemble, deliver, and e-sign. Guide your clients through an intuitive process so you can e-file.



6

INVOICE & COLLECT TAX PREP FEES FASTER

With **SafeSend Returns**, collecting payment for your tax prep service is built into the client interface. Upload your invoice and make it easy for your clients to pay!

