



SafeSend

Returns

Quick Reference Guide

Partner Review

Tax Return assigned to you ↳ Inbox x



An email notification will be sent to you from
noreply@safesend.com

JHW Accountancy LLC <noreply@safesendreturns.com>

3:31 PM (0 minutes ago)



to me ▾



PLEASE DO NOT REPLY TO THIS EMAIL NOTIFICATION

[Link to log into SafeSend Returns](#)

The following tax return has been assigned to you. Please login at <http://www.safesendreturns.com> to process the return.





FileName	46372	Client ID
Created By	ssrfirmtrainings@safesend.com	Email address of the person who sent the return to you for review
TaxPayer	William McTell	Taxpayer Name

www.safesendreturns.com

My Assignments

Assign Delete Set Access

Search

Name	Client ID	ERO / Signer	Status	Date	Type	Tax Year	Action
Name	Client ID	ERO / Signer	Select Status...	Select Uploaded Date Limit	Select Type...	Select Tax Year...	
McTell, William	46372	Betty Davis	REVIEW	01/15/2021	1040	2019	   

Showing 1 to 1 of 1 entries





Returns assigned to you for Review will appear when you log in

1

My Assignments

Assign Delete Set Access

Search

Name	Client ID	ERO / Signer	Status	Date	Type	Tax Year	Action
Name	Client ID	ERO / Signer	Select Status...	Select Uploaded Date Limit	Select Type...	Select Tax Year...	
McTell, William	46372	Betty Davis	REVIEW	01/15/2021	1040	2019	   

Showing 1 to 1 of 1 entries

Click to begin Review process

1

Review all information with a primary focus on the following pages

Client Info
Group
Transmittals
Tax Returns
E-File
Additional E-Sign Documents
Vouchers
Invoices
Attachments
Delivery Options

Client Details

Form 1040 - U.S. Individual Income T...

Refunds & Payments Due

- P California (\$10460.00) ✖
- P California (\$900.00) ✖
- P California (\$800.00) ✖
- P Federal (\$70685.00) ✖
- \$ Colorado \$13283.00 ✖

Added Refunds +

No Content

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KBA13
22

Form **1040** Department of the Treasury - Internal Revenue Service (99) **U.S. Individual Income Tax Return** **2019** OMB No. 1545-0074 IRS Use Only - Do not write or staple in this space.

Filing Status Single Married filing jointly Married filing separately (MFS) Head of household (HOH) Qualifying widow(er) (QW)

Check only If you checked the MFS box, enter the name of spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is one box. a child but not your dependent. ▶

Your first name and middle initial William	Last name (Dec. 06/12/63) McTell	Your social security number 601 38 9834
If joint return, spouse's first name and middle initial	Last name	Spouse's social security number

Home address (number and street). If you have a P.O. box, see instructions. Apt. no. **Presidential Election Campaign**
4527 WRANGELL RR
 City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions).
MONTROSE, CO 81401

Foreign country name	Foreign province/state/county	Foreign postal code
----------------------	-------------------------------	---------------------

Standard **Someone can claim:** You as a dependent Your spouse as a dependent
Deduction Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness You: Were born before January 2, 1955 Are blind **Spouse:** Was born before January 2, 1955 Is blind

Dependents (see instructions):		(2) Social security number	(3) Relationship to you	(4) if qualifies for (see instructions):	
(1) First name	Last name			Child tax credit	Credit for other dependents

+ Return Information

- Taxpayer

Name

SSN

Address

City

State

Zip

DOB

Mobile () -

Email

Verify email address

Client Info Group **Transmittals** Tax Returns E-File Additional E-Sign Documents Vouchers Invoices Attachments Delivery Options

Transmittals

- Transmittal [6]
- Transmittal [7]
- Transmittal [8]
- Transmittal [9]
- Transmittal [10]

Manually Added Vouchers +

- P District of Columbi... (\$1740.00) ✕
- ES Virginia 4Q ES (\$20000.00) ✕

Recognized Vouchers

- P US 1040-V (\$70685.00)
- P California 3582 (\$10460.00)
- P California 3522 (\$800.00)
- P California 3536 (\$900.00)
- ES US 1040-ES (\$18927.00)
- ES US 1040-ES (\$18927.00)
- ES US 1040-ES (\$18927.00)
- ES California 540-ES (\$1966.00)
- ES California 540-ES (\$1966.00)

5 / 5

Amount of tax	Total Estimated Tax	\$	12,100
	Less credit from prior year	\$	0
	Less amount already paid on 2020 estimate	\$	9,200
	Balance due	\$	2,900

Double in full or in installments as follows:

	Amount	Due Date
No. 1	\$ 0	July 15, 2020
No. 2	\$ 0	July 15, 2020
No. 3	\$ 0	September 15, 2020
No. 4	\$ 2,900	January 15, 2021

Make check payable to See special instructions

Mail voucher and check (if applicable) to See special instructions

Special Instructions Electronic filing has been selected for the declaration of estimated tax. Payment for the following voucher(s) will be automatically withdrawn from your account ending in 2323 for the amount(s) on or after the date(s) listed below. Refer to Form 1040-ES on the Direct Deposit/Debit Report for complete account information. Do not mail a paper copy of the voucher(s).

Voucher Details

Authority: Virginia

Payment Type: Q4 Estimated Payment

DueDate: 01/15/2021

Voucher Amount: \$ 20000.00

Form Name: 4Q ES

Online payment required

Payment Url: <https://www.tax.virginia.gov/payments>

✕ Cancel ✓ Update

Verify that all payments are accounted for and correct

Taxpayer Dashboard

Taxpayer Preview

Contact Person:

Dean Wareham

Message From Preparer:

Default Message

+ New

Edit

Make sure messaging for taxpayer is correct

<RECIPIENT>
Your estimated payments may change and we will provide you with that updated information as soon as it's ready.
Remember to download a copy of your return for your records.

Message From Preparer

Edit Format

Rich text editor toolbar with icons for undo, redo, bold, italic, underline, bulleted list, numbered list, indent, decrease indent, font color, and background color.

<RECIPIENT>
Your estimated payments may change and we will provide you with that updated information as soon as it's ready.

Remember to download a copy of your return for your records.
Please let us know if you have any questions.

Thank you,
Joe Wroblewski
joe.wroblewski@safesend.com
800 716-2558

+ Show Variables List

*Required

Update

Cancel

Client Info Group Transmittals **Tax Returns** E-File Additional E-Sign Documents Vouchers Invoices Attachments **Delivery Options**

Taxpayer Dashboard

Select Taxpayer Preview to review the return from taxpayer point of view prior to delivery

Taxpayer Preview

Dean Wareham

Default Message

+ New

Edit

<RECIPIENT>

Your estimated payments may change and we will provide you with that updated information as soon as it's ready.

Remember to download a copy of your return for your

Finish Return Processing

Internal Routing

- Send for Review
- Approve for Delivery

Delivery

- Deliver to Client

Taxpayer

Name William McTell
SSN 601389834
Address 4527 WRANGELL RR
Email safesenddemo@gmail.com

Cancel Send

Select:
Finish
Deliver to Client
Send

Previous Next Save & Close Finish

Questions?

Contact our Support team at
support@safesend.com or 855-818-3552.