



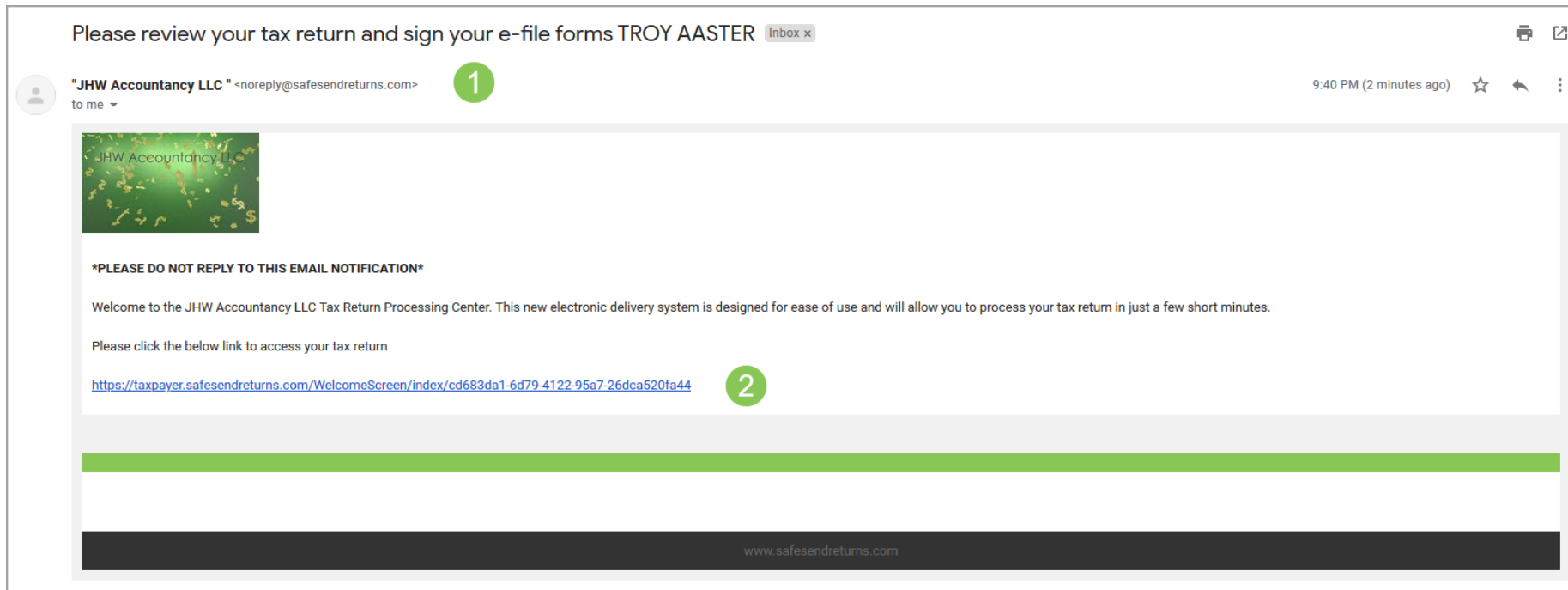
SafeSend  
**Returns**

Quick Reference Guide  
1040 – Client Experience

[safesend.com](https://safesend.com)

Your tax firm will send you a secure email like the one shown below

- 1 The email will come from [noreply@safesendreturns.com](mailto:noreply@safesendreturns.com)
  - We recommend that you add this email address to your safe sender list to avoid these notifications going into spam
  - Your firm's name will appear in front of the email address
  - Your firm's logo may appear in the body of the email
  - Your name will appear in the subject line of the email
- 2 Click on the link in the email



1

Click the "Click Here to Get Started" tab to continue

**2019 Tax Return**

DAN LLION

Click Here to Get Started

Prepared by

**AM Accounting**

3537 E Overland Rd  
Meridian ID 83642

- 1 Insert the last four digits of your SSN
- 2 Click "Authenticate to continue"

### Authentication

**DAN LLION**

Please enter the last four digits of your Social Security Number:  
*(We use the last four digits to verify your identity)*

0535

1

Continue

2

- 1 Click "Request Access Code"
- 2 You will receive an email notification with an Access Code
  - Copy the Access Code and return to the page below
- 3 Paste or type the Access Code into the requested field
- 4 Click "Continue"

## Authentication

### Access Code Required

Please select "Request Access Code" and we will send you a one-time expiring access code to your email.

Request Access Code

1

Enter access code here:

59091629

3

(This code will expire in 20 minutes)

4

Continue

Code for TROY AASTER Inbox x

2



"JHW Accountancy LLC" <noreply@safesendreturns.com>  
to me ▾

Your one time code is 75508791

Reply

Forward

- 1 The left panel shows a summary of refunds and payments due.
- 2 Click "Click Here to Begin" to continue

AM Accounting Tax year: 2019 Contact Person DAN LLION

1 Summary Review Sign Pay

### 2019 Tax Return

**Refunds**

Arizona	\$4,190
<b>Total</b>	<b>\$4,190</b>


**Payments Due**

Federal	\$35,229
California	\$5,006
California	\$800
<b>Total</b>	<b>\$41,035</b>


## Welcome DAN LLION

### Your 2019 tax returns are ready!


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



Review Documents



Sign Documents



Make Payments

2

Click Here to Begin

### 2020 Estimated Payments

**Q1**

Federal	\$9,416
Arizona	\$1,453
California	\$1,209
<b>Total</b>	<b>\$12,078</b>

**Q2**

Federal	\$9,416
Arizona	\$1,453
California	\$1,209
<b>Total</b>	<b>\$12,078</b>

1 You will see a message from the preparer

2 Click "Continue"



Summary



Review



Sign



Pay

### A message from AM Accounting



Set Default Test

1

Back

2

Continue

- 1 Review your tax documents
- 2 Forward a copy of your return, if needed
- 3 Click "Continue"

AM Accounting

 Tax year: 2019   Contact Person   DAN LLION ▼

Summary ————— Review ————— Sign ————— Pay

Review Tax Documents - Tax Returns
Download Tax Document(s)

1    << < > >>    1 of 72    Automatic Zoom

Tax Returns

KBA1 01/29/2020 5:00 PM

<b>1040</b>	<b>Federal Return Summary</b>	<b>2019</b>
Name <b>DAN LLION</b>		Taxpayer Identification Number <b>362-56-3215</b>
Tax Form	1040	Filing Status
Tax Method Used	<u>Tax Computation Wrk</u>	SGL
<b>Income</b>		<b>Tax Computation</b>
Salaries & wages	100,000	Regular tax
Taxable interest income	35,500	Alternative minimum tax
Tax exempt interest		Excess advance premium tax credit
Dividend income		Total tax before credits
Qualified dividends		29,775
Taxable state/local refunds		Child and dependent care credit
Alimony received		Education credits
Business income/loss	31,584	Other credits
Capital gain/loss		Total credits
Other gain/-loss (Form 4797)		29,775
Taxable IRA distributions	2,000	Tax after credits
Taxable pension distributions		4,463
		Self-employment tax
		4,463
		Additional tax on IRAs, etc.
		Other taxes

Back

2

Forward a copy of my tax documents

3

Continue



- 1 Select to E-Sign OR
- 2 Select to Manually Sign


AM Accounting Tax year: 2019 Contact Person DAN LLION

Summary — Review — **Sign** — Pay

### Sign Tax Documents

Select the method you would like to use to sign your documents


1



e-Sign

Sign electronically from this website

2



Manually Sign

Print, Sign and Return the forms

Back

- 1 Enter your date of birth
- 2 Check the box to consent to e-signing
- 3 Provide your spouse's email address if applicable
  - It can be the same as yours
- 4 Click "Continue"



Summary



Review



Sign



Pay

## Sign Tax Documents Electronically

Before signing, you will need to verify your identity by answering a few short questions about yourself.

Please verify/enter the information requested and click continue to begin

Your Date of Birth:

1

2

I have reviewed my tax returns and consent to e-Sign

### Spouse's Signature Required

Please provide an email address for your spouse. It may be the same as your own if you share an email account. They will receive a similar request asking them to Sign their forms electronically.

Spouse's Name: **JILL ANDERSON**

Email Address:

3

[Back](#)

4

[Continue](#)

- 1 Answer 3 questions correctly
  - You may see up to 5 questions
- 2 Click "Continue"



Summary



Review



Sign



Pay

## Security Questions

IRS required Disclosure. Please verify your identity by answering the following questions. These questions are generated from a third party's database. This process does not access or impact your credit report and the third party does not have access to your taxpayer information. Please answer the following.

### 1. Which of the following boats or watercrafts have you owned?

- 14 ft. Glass Master 04016f
- 19 ft. Stingray 190 Lx
- 20 ft. Smoker Craft Inc 20hw5
- 22 ft. Boston Whaler 220da
- None of the above

1

2

Continue

- 1 Select the "Start" or "Next" flag and click each signature box
- 2 Click "Apply" and repeat for all signature locations Click
- 3 "Continue when finished"

AM Accounting Tax year: 2019 Contact Person DAN LLION

Summary Review Sign Pay


1 of 5 Automatic Zoom

Tax Document
 

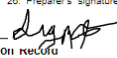
- 114
- IRS 8879
- AZ-8879
- California 8879
- 8453-LLC

1. Owner last name or entity's legal name <b>LLION</b>	2. Owner first name <b>DAN</b>	3. Owner M. I.
4. Spouse last name (if jointly filing FBAR - see instructions below)	5. Spouse first name	6. Spouse M. I.

I/we declare that I/we have provided information concerning 1 (enter number of accounts) foreign bank and financial account(s) for the filing year ending December 31, 2019 to the preparer listed in Part II; that this information is to the best of my/our knowledge true, correct, and complete; that I/we authorize the preparer listed in Part II to complete and submit to the Financial Crimes Enforcement Network (FinCEN) a Report of Foreign Bank and Financial Accounts (FBAR) based on the information that I/we have provided; and that I/we authorize the preparer listed in Part II to receive information from FinCEN, answer inquiries and resolve issues relating to this submission. I/we acknowledge that, notwithstanding this declaration, it is my/our legal responsibility, not that of the preparer listed in Part II, to timely file an FBAR if required by law to do so.

7. Owner signature (Authorized representative if entity) 	8. Date <b>01/26/2021</b> MM DD YYYY	9. Owner or entity TIN <b>999-99-9991</b>	10. TIN type a EIN b SSN/ITIN c <input checked="" type="checkbox"/> Foreign
11. Spouse signature	12. Date <b>08/08/2020</b> MM DD YYYY	13. Spouse TIN <b>999-99-9992</b>	14. TIN type a EIN b SSN/ITIN c <input checked="" type="checkbox"/> Foreign

**Part II Individual or Entity Authorized to File FBAR on behalf of Persons who have an obligation to file.**

15. Preparer last name	16. Preparer first name	17. Preparer M.I.	18. Preparer PTIN
19. Address	20. City	21. State	22. ZIP/postal code
23. Country code	24. Preparer's (item 15) employer's (Entity) name	25. Employer EIN	26. Preparer's signature 

Instructions for completing the FBAR Signature Authorization record  
This is a fill-and-sign form using Adobe Reader.

Back Continue

Add Signature

Type Draw

Name  
DAN LLION

Draw Your Signature Clear

*DAN LLION*

Cancel Apply

Payment details are listed below

**Tax Payments**  
Select to see details

**2019 Tax Payments**

**Due Oct 2020 \$57,266**

**2020 Estimated Payments**

Due Apr 2020	\$912
Due Jun 2020	\$912
Due Jul 2020	\$28,140
Due Sep 2020	\$14,982
Due Jan 2021	\$14,982

Preparation Fee  
Choice for tax services

Email me reminder 10 days before payment is due

Due 10/15/20

Federal \$52,820

Pay

[Add payment details](#)

Due 10/15/20

Arizona \$3,646

Pay

[Add payment details](#)

Due 10/15/20

California \$800

Pay

[Add payment details](#)

Payment Information

[Download Filing Instructions](#)

**Internal Revenue Service**

Amount: **\$18,927**

Due: **01/15/2021**

**Pay By Check or Money Order**

Select "Download Filing Instructions" above to review your payment and mailing instructions. Select the button below to download your payment voucher.

[Download Voucher](#)

**Pay Online Now**

Select "Download Filing Instructions" above to review your payment instructions. Select "Pay Online" below to make your payment.

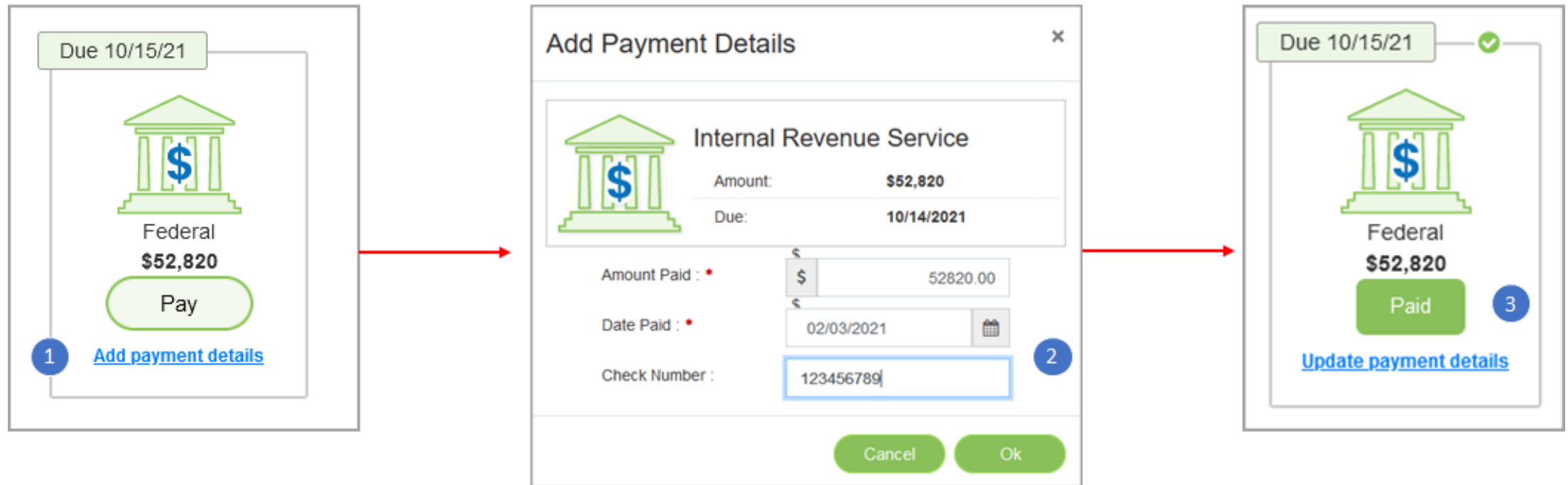
[Pay Online](#)

Done

- 1 View Payment Options
- 2 Download and Pay Manually
- 3 Pay Online

## Record your payment information

- 1 Select "Add payment details"
- 2 Enter payment information
- 3 Payment will be marked as "Paid"



# Questions?

Contact our Support team at  
[support@safesend.com](mailto:support@safesend.com) or 855-818-3552.