**Client Email**

## Send a templated email to the taxpayer before you send them their tax return

Just before you deliver the tax return, send a templated email to the taxpayer. Your firm should develop standard templates and ensure all Admin has them saved in their Drafts Folder. They can simply select “Forward” and enter the taxpayer email address and send.

**Individuals**

Good Afternoon,

Your tax return is complete and will be delivered electronically via SafeSend Returns.

SafeSend Returns is a user-friendly and highly secure technology solution that allows you to manage your tax returns from the convenience of a computer, smartphone, or tablet.

* You will receive an email from <FIRM NAME> at *noreply@safesendreturns.com*. Add this email to your safe list to prevent it from being categorized as spam or junk.
* If you do not see an email from <FIRM NAME> at *noreply@safesendreturns.com*, **please check your Spam or Junk Folder.**
* For the best experience, **we recommend using Google Chrome**.

The email will contain a safe link to access your tax returns. You will enter the last four digits of your SSN and “request an access code” which you will receive via email and enter in the required field.

Once you have gained access to your tax returns, you will be able to:

* Download, review and/or print your tax returns.
* See if you owe taxes, are receiving any refunds, and see your estimated tax payments (if applicable).
* Electronically sign your personal e-file authorization forms.  For personal returns, the IRS requires identity verification. Please do not be alarmed by the personal questions as these are pulled from public databases.

For those filing “Married Filing Jointly,” the system will ask you to provide your spouse’s email address. You and your spouse may share the same email address.

Your spouse will then receive the same email and follow the same instructions to electronically sign the e-file authorization forms. Please note, the IRS requires both individuals electronically sign independent of each other.

Here is a link to a short 3 minute [video](https://safesendreturns.zendesk.com/hc/en-us/articles/360010788033-Tax-Return-Recipient-Help-1040-) that will walk you through the process.

If you should have any questions, please feel free to contact me.

Thanks,

**Entities**

Good Afternoon,

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The email will contain a safe link to access your tax returns. You will “request an access code” which you will receive via email and enter in the required field.

Once you have gained access to your tax returns, you will be able to:

* Download, review and/or print your tax returns.
* See if you owe taxes, are receiving any refunds, and see your estimated tax payments (if applicable).
* Electronically distribute your K-1s to your Partners/Shareholders.
* Print, sign and upload your e-file authorization forms. Please note, the IRS does not approve electronic signatures on e-file forms for entity returns.

Here is a link to a short [K-1 Distribution Video](https://safesendreturns.zendesk.com/hc/en-us/articles/360011132693-Entity-Taxpayer-Experience-with-K1-Distribution) that will walk you through this process.

If you should have any questions, please feel free to contact me.

Thanks,

**Individuals/Entities Combined Template**

Good Afternoon,

Your tax return is complete and will be delivered electronically via SafeSend Returns.

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* If you do not see an email from <FIRM NAME> at *noreply@safesendreturns.com*, **please check your Spam or Junk Folder.**
* For the best experience, **we recommend using Google Chrome**.

The email will contain a safe link to access your tax returns. You will enter the last four digits of your SSN and “request an access code” which you will receive via email and enter in the required field.

Once you have gained access to your tax returns, you will be able to:

* Download, review and/or print your tax returns.
* See if you owe taxes, are receiving any refunds, and see your estimated tax payments (if applicable).
* Electronically sign your personal e-file authorization forms.  For personal returns, the IRS requires identity verification. Please do not be alarmed by the personal questions as these are pulled from public databases.

For those filing “Married Filing Jointly,” the system will ask you to provide your spouse’s email address. You and your spouse may share the same email address.

Your spouse will then receive the same email and follow the same instructions to electronically sign the e-file authorization forms. Please note, the IRS requires both individuals electronically sign independent of each other.

Here is a link to a short 3 minute [video](https://safesendreturns.zendesk.com/hc/en-us/articles/360010788033-Tax-Return-Recipient-Help-1040-) that will walk you through the process.

**Additional Feature for Entities:**

* Electronically distribute your K-1s to your Partners/Shareholders.
* Print, sign and upload your e-file authorization forms. Please note, the IRS does not approve electronic signatures on e-file forms for entity returns. OR Electronically sign your business e-file authorization forms.

Here is a link to a short [K-1 Distribution Video](https://safesendreturns.zendesk.com/hc/en-us/articles/360011132693-Entity-Taxpayer-Experience-with-K1-Distribution) that will walk you through this process.

If you should have any questions, please feel free to contact me.

Thanks,