

FINNEY, NEILL & COMPANY, P.S.

CERTIFIED PUBLIC ACCOUNTANTS

SafeSend Returns for Tax Return Delivery

We are pleased to offer SafeSend Returns to our clients as a secure, electronic tax return delivery system. The client-friendly interface walks you through a guided process that includes on-screen review of your return, collection of IRS-compliant e-signatures on e-file authorization forms, and options for making tax payments. In addition, SafeSend Returns automatically sends the e-signed form(s) back to Finney, Neill & Co.

Benefits of Using SafeSend Returns

- You will be able to electronically view, sign, save and print most tax documents - no printing or mailing necessary.
- You will be able to receive estimated tax payment reminders at a schedule of your choosing.
- You will have access to your tax return for seven years.
- For individuals: one place to sign your engagement letter, answer the questionnaire, complete the organizer, and upload documents to us.
- For businesses: conveniently distribute your K-1s electronically.

How Tax Return Signing Works

- For the best experience, we recommend using the web browser Google Chrome.
- You will receive an email from Finney, Neill & Co. with a “from” address of **noreply@safesendreturns.com**.
- The email will contain a safe link for you to access your tax return.
- After clicking on the link, you will be asked to enter the last four digits of your Social Security number to review your return.
- SafeSend will email or text you an access code to further verify your identity. For emailed codes, check your spam or junk folders if you do not receive the email in your inbox. You must enter the code within 20 minutes of receipt. If you do not enter the code within 20 minutes, you can request another.
- When you are ready to sign your e-file authorization form(s), you will be asked three simple questions to verify your identity.
- Once you have signed the e-file authorization form(s), Finney, Neill & Co. will be notified and will complete the rest of the e-filing process.
- For a step-by-step video guide, see the following:
 - [Individual client experience video](#)
 - [Entity client experience video](#)
- Please note that while the organizer can be completed from a mobile device such as a smartphone or tablet, the experience is more robust from a computer

How Tax Organizers for Individuals Works:

- Please note that not all tax organizer functions can be completed on a mobile device such as a smartphone, so we recommend using a desktop computer.
- For the best experience, we recommend using the web browser Google Chrome.
- You will receive an email from Finney, Neill & Co. with a “from” address of **noreply@safesendreturns.com**.
- The email will contain a safe link for you to access your tax organizer.
- SafeSend will email or text you an access code to further verify your identity. For emailed codes, check your spam or junk folders if you do not receive the email in your inbox. You must enter the code within 20 minutes of receipt. If you do not enter the code within 20 minutes, you can request another.
- You will then be prompted to sign documents, complete the questionnaire and organizer, and upload documents.
- Once you have signed your documents, you will have access to the questionnaire, and once you have completed the questionnaire, you will have access to your organizer & document upload.
- Once you have completed the questionnaire, organizer (optional), and uploaded all your documents, please be sure to select the “**Finish**” button. This will notify our team that your organizer is complete and ready for processing. Your organizer will not be considered received until the finish button is selected. Once you select finish, your organizer and upload portal will be locked, if you need it re-opened for any reason, please contact us at tax@finneyneill.com
- For a step-by-step video guide see the following: [Organizer client experience video](#)

Frequently Asked Questions

Q: Will I receive a notification when my return is ready to sign?

A: Yes. Email notifications will be sent from Finney, Neill & Co. at noreply@safesendreturns.com. To prevent the email from getting filtered to spam/junk, we recommend adding this email address to your safe list.

Q: Is it safe to enter part of my Social Security Number?

A: Yes. SafeSend Returns offers a secure system to view and sign your e-file authorization form(s).

Look for <https://> at the beginning of the site URL and a locked padlock symbol in your browser’s URL bar to confirm you are on the secure site.

Q: What if I don’t receive an email with my access code?

A: Check your spam/junk email folder. If you do not receive your code within the 20-minute time limit, please request another. You can also search your email for “noreply@safesendreturns.com.”

Q: Where do the identity verification questions come from? What if I don’t remember the answers?

A: The questions SafeSend Returns asks are knowledge-based questions pulled from government and credit sources. You may be asked questions such as where you lived in a given year, or when you bought your car or home. In the event the questions do not apply to you, simply choose the answer that accurately reflects this. If you do not remember the answers to the questions, or you answer incorrectly, you will have an additional chance to answer a new set of questions. If you are unable to answer 3 out

of 5 questions accurately, you will not be able to electronically sign your e-file authorization form(s). You can instead print, sign and return your e-file authorization form(s) to Finney, Neill & Co.

Q: Will this work on any internet-connected device? Does SafeSend Returns offer an app for my smartphone?

A: The tax return delivery process can be completed on any computer, smart phone, or tablet via a web browser. There is currently no SafeSend Returns app available. A desktop computer is recommended for individual tax organizers.

Q: Will I have the option to download and print my return to retain for my records?

A: Yes. You can download and print your return from a computer or tablet. If you are using a smartphone, you can review and e-sign your return package but not print it. Please use a laptop or desktop computer for the best printing experience.

Q: How is this process different from e-filing?

A: SafeSend Returns allows you to electronically sign your e-file authorization form(s), but it will not submit your return to the IRS. Once signed, Finney, Neill & Co. is automatically notified, and we will complete the filing process for you, including submission to the IRS.

Q: My spouse and I file our return jointly. How can we both sign the e-file authorization form(s)?

A: For spouses filing jointly, there are a few ways to sign via SafeSend Returns:

If both spouses have an email address on file, both will receive an email with a link to view the return and sign the e-file authorization form(s). First one spouse will receive the link with identity verification questions specific to them. They will sign the e-file authorization form(s) and confirm the spouse's email address, which will automatically send an email link to the second spouse. The second spouse will answer identity verification questions specific to them and e-sign the form(s).

If only one spouse has an email address on file, that spouse will first receive the link with identity verification questions specific to them. They will sign the e-file authorization form(s) and then enter an email address for the second spouse. The second spouse will then receive the email link with identity verification questions specific to them.

If a couple shares an email address, the primary signer will first receive a link with identity verification questions specific to them. After the primary signer signs the e-file authorization form(s), they can then enter the shared email address again. A new link will be sent with identity verification questions specific to the second spouse.

Q: Can I sign my dependent's return electronically?

A: We will deliver your dependent's return via SafeSend Returns, however, due to the knowledge-based identification requirements of the IRS, a minor dependent may not qualify, so you will need to manually sign and return your dependent's e-file authorization form.

Q: I'd rather print and sign my e-file authorization form(s). Can I do that?

A: Yes - You can still print, sign, and mail your e-file form(s) back to Finney, Neill & Co. if you'd prefer to do so.

Q: After signing my e-file authorization form(s), will I receive confirmation that it was successfully submitted?

A: Yes! Once you sign your e-file authorization form(s), you will receive an email stating it was successful. The email will also include a link to download a copy of your tax return for your records.

Q: Can I set up reminders for my quarterly estimated payment?

A: When estimated tax payment vouchers are included in your tax return, you will automatically receive an email reminder before your payment is due.

For More Assistance

If you have additional questions regarding SafeSend Returns, please contact any of us here at Finney, Neill & Co.