

YOUR STEP BY STEP GUIDE TO TAX SEASON

RECEIVE YOUR
EMAIL FROM
SAFESEND



You will receive an email from **noreply@SafeSend.com**. Follow instructions in the email to access your portal.

COMPLETE YOUR
QUESTIONNAIRE
(REQUIRED) AND
ORGANIZER
(OPTIONAL)



Complete the questionnaire. These questions are required! We **cannot** proceed without them.

UPLOAD YOUR
TAX
DOCUMENTS



Best practices: upload all of your tax documents at once. Try to avoid uploading one document at a time.

YOUR RETURN IS
PREPARED



Our CPAs are working diligently on completing your return!

SIGN YOUR TAX
RETURN &
DOWNLOAD FOR
YOUR RECORDS



Your return will be sent to you via SafeSend Returns. Follow the link sent to you via email and sign!