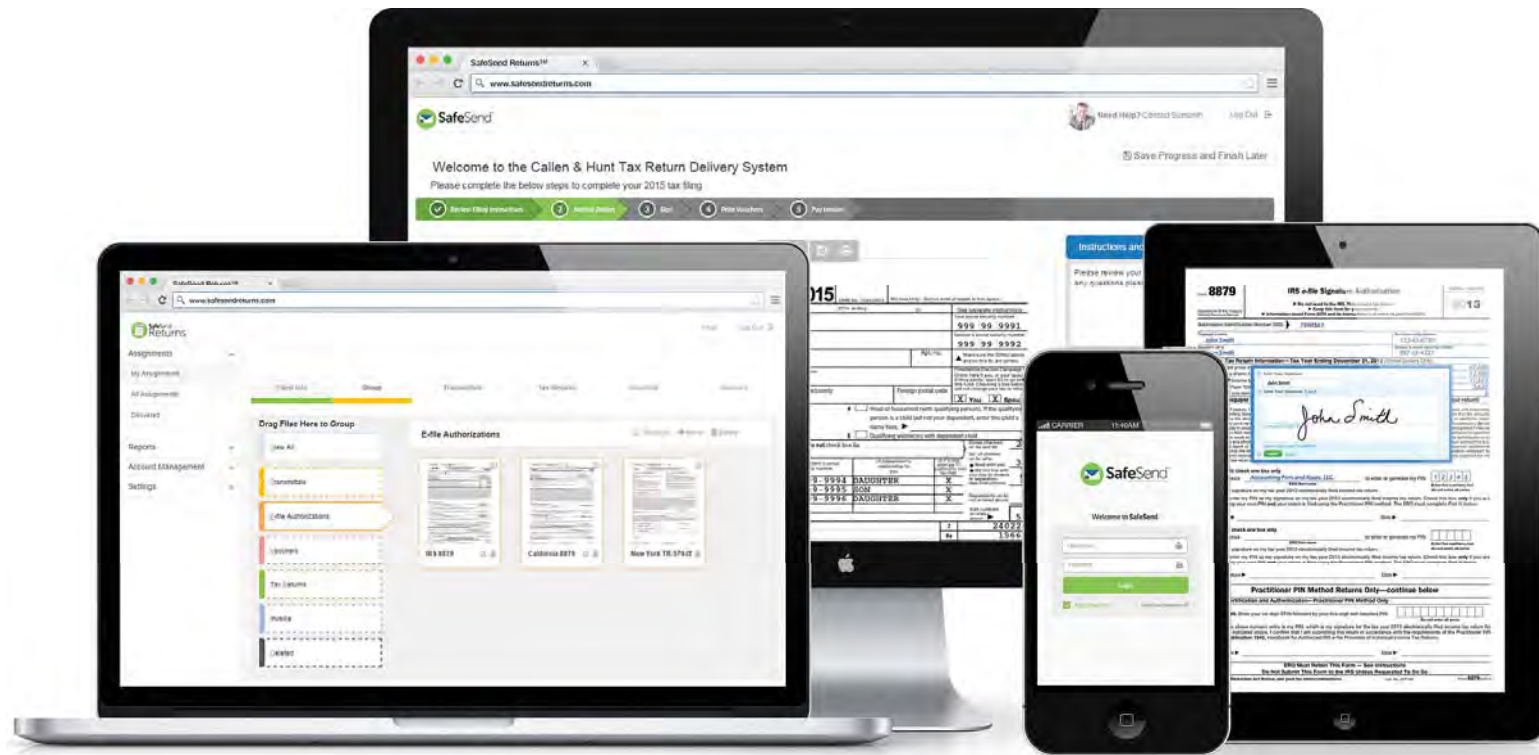


SafeSend Returns Taxpayer Quick Reference Guide



Heinold Banwart, Ltd.
Certified Public Accountants



- Upon completion of your tax return, you will receive email notification from HB that your tax documents are ready to be reviewed and signed.



Heinold Banwart, Ltd.
Certified Public Accountants

PLEASE DO NOT REPLY TO THIS EMAIL NOTIFICATION

Welcome to the Heinold Banwart, Ltd. Tax Return Processing Center, powered by SafeSend Returns. This new electronic delivery system is designed for ease of use and will allow you to review and sign your tax return in just a few short minutes.

Click the below link to access your tax return. Please be sure to (1) download and save your tax documents to your computer or mobile device and (2) save this link for future access.

<https://taxpayer.safesendreturns.com/WelcomeScreen/index/e6f43c59-1329-4e06-89bb-54fd49956f61>

Have a question about SafeSend Returns? Find HB's SafeSend Returns Taxpayer Quick Reference Guide here: <http://www.hbcpas.com/resources/>.

Click on the
link to access
your return

Welcome to Your Tax Firm

Welcome to the Your Tax Firm Return Processing System. This system is designed to simplify your review of your Tax Return, and expedite the required steps for Electronic Filing. Each step will include additional instructions to ensure successful completion of the process. As you continue through the necessary actions, should you need to finish later, you may save your progress and return another time.

Pat Taxpayer, Please enter the last four digits of your Social Security Number:

Enter the last four digits of your SSN and click to continue.

Authenticate to continue

***Sample Return**

2015 Tax Return

Prepared by
Alexander Williams **Contact**

Refunds
California **\$893**
Illinois **\$52**

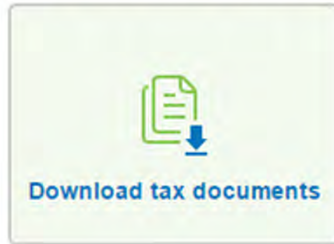
Payments Due
Federal **\$368**

Welcome Pat Taxpayer, your 2015 tax returns are ready!

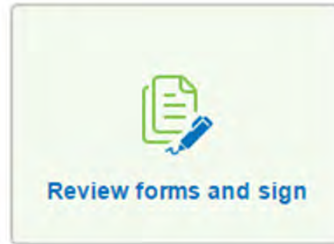
A message from your tax preparer

Hi Pat,
Please review your return and contact us with any questions.
Thank you

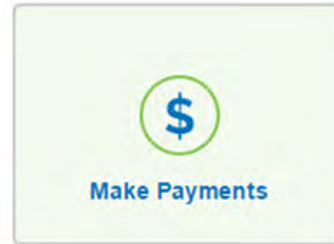
Follow these steps to file your taxes



Download tax documents



Review forms and sign



Make Payments

This page is an overview of your return and may contain an important message. Review and click to continue.

Lets Get Started

***Sample Return**



Download Documents



Review & sign



Pay

Please choose if you would like to download your documents now or have them securely emailed to you to download later

How would you like to proceed?



Download my tax documents



Securely Email my tax documents to me

Your 2015 Tax Documents

Optionally select a single document to download

Tax Documents

Filing Instructions



2015 Tax Returns



Payment Vouchers

Payments Due On 4/15/2016



Payments Due On 4/18/2016



Payments Due On 6/15/2016



Payments Due On 9/15/2016



Payments Due On 10/16/2016



Payments Due On 1/15/2017



Payments Due On 1/17/2017



Invoice & Attachments

Tax Preparation Fee



Schedule D.pdf

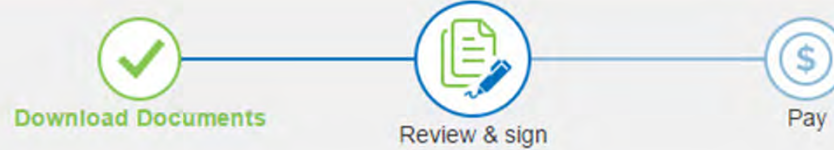


Download and review your tax documents. Click to continue.

***Sample Return**

Save and Exit

Continue



Select how you would like to sign your documents

How would you like to sign your documents?

 Sign Electronically

 Print & Sign

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:

I have reviewed my tax return and consent to e-sign

Spouses signature required

Please provide an email address for your spouse so that they may receive a similar request asking them to Review and Sign their forms electronically.

Spouse's Name:
Chris Taxpayer

Email Address:

Enter your date of birth, provide your spouse's email address (if applicable), and consent to e-sign. Click to continue.

Save and Exit

Continue

***Sample Return**



Download Documents



Review & sign



Pay

Security Questions: #1

Please answer the following:

1. In which of the following states does 'Carol Llion' currently live or own property?

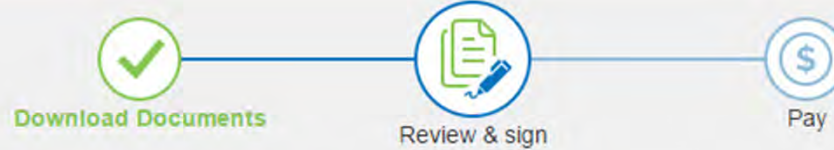
- Alabama
- Colorado
- Tennessee
- Utah
- Washington
- None of the above or I am not familiar with this person

Answer 3-5 security questions to verify your identity and click to continue.

Continue

***Sample Return**

Save and Exit



Signatures Needed

- 1. IRS 8879
- 2. California 8879
- 3. Illinois 8453

of fees to receive confidential information necessary to answer inquiries and resolve issues related to the payment, I further acknowledge that the personal identification number (PIN) below is my signature for my electronic income tax return and, if applicable, my Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

I authorize Watson Associates to enter or generate my PIN 13245 as my signature on my tax year 2015 electronically filed income tax return. Enter five digits, but do not enter all zeros

I will enter my PIN as my signature on my tax year 2015 electronically filed income tax return. Check this box only if you are entering your own and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

1

Next

Click here to sign NOT A FILEABLE COPY ***** Date ► 10/11/2016

check one box only

I authorize Watson Associates to enter or generate my PIN 45321 as my signature on my tax year 2015 electronically filed income tax return. Enter five digits, but do not enter all zeros

I will enter my PIN as my signature on my tax year 2015 electronically filed income tax return. Check this box only if you are entering your own and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Signature ► _____ Date ► 01/20/2016

Practitioner PIN Method Returns Only - continue below

Part III Certification and Authentication - Practitioner PIN Method Only

EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN. 87654154321
Do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature for the tax year 2015 electronically filed income tax return for the taxpayer(s) listed above. I confirm that I am submitting this return in accordance with the requirements of the Practitioner PIN method and Publication 1345, Booklet for Authorized IRS e-file Providers of Individual Income Tax Returns.

My signature ► Watson Associates Date ► 01/20/2016

ERO Must Retain This Form - See Instructions
Do Not Submit This Form to the IRS Unless Requested To Do So

OMB For Paperwork Reduction Act Notice, see your tax return instructions. 2 Form 8879 (2015)

Type Draw

1 Enter Your Name
Pat Taxpayer

2 Your Signature
Pat Taxpayer

Clear

Cancel Apply

2

- 1. Select all "Click here to sign" locations.
- 2. Select "Apply." Repeat for all signature locations.
- 3. Click "Continue" when finished.

*Sample Return

Save and Exit

3

Continue



Please print your payment vouchers and send to the appropriate taxing authority by the due date. Selecting the "Direct Payment" link will allow you to pay online. We will send you a payment reminder days before each quarterly due date.

Your 2015 Tax Payments

Due Apr 2016 \$1,067

Due Jun 2016 \$25,658

Due Sep 2016 \$20,195

Due Oct 2016 \$80,653

Due Jan 2017 \$25,108

1 Save All Payment Vouchers

Save Invoice: Tax Preparation Fee

Due 04/15/16



Federal \$156

2

Pay

Email me reminder 7 days before pay

Payment Information

Internal Revenue Service
Amount: \$156 Due: 04/15/16

Pay By Check or Money Order
Your tax preparer has provided payment and mailing instructions below

Save Payment Instructions

or

Save Federal voucher due 04/15/16

Pay Online Now
Click on the button below to make a direct payment electronically

Pay Online

3 4

Done

As applicable:
1. Save all payment information.
2. View payment options.
3. Use payment vouchers if paying by mail.
4. Online payment may be available but usually incurs additional processing fees.
5. When finished, click "Done."

*Sample Return

5

Still have questions?

**Call our office at (309) 694-4251
and ask for a member of our
administrative team.**



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