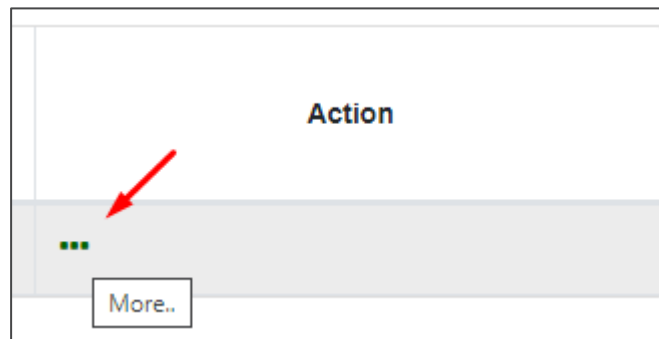


## SafeSend Instructions

KPM recommends using the Google Chrome browser on either a computer or cell phone for the best experience while using SafeSend. In addition, please save the email you receive from [noreply@safesendreturns.com](mailto:noreply@safesendreturns.com), which includes a link allowing you to access your return at a later date to review or download.

### Helpful Tips:

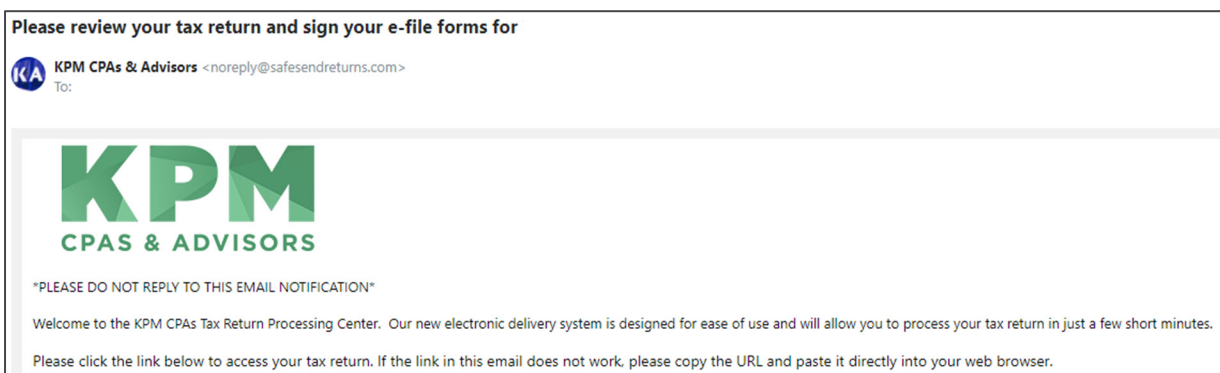
1. If you are unable to double click on your tax return in the Tax Return Dashboard, click on the three dots for the 'More' button in the 'Action' column.



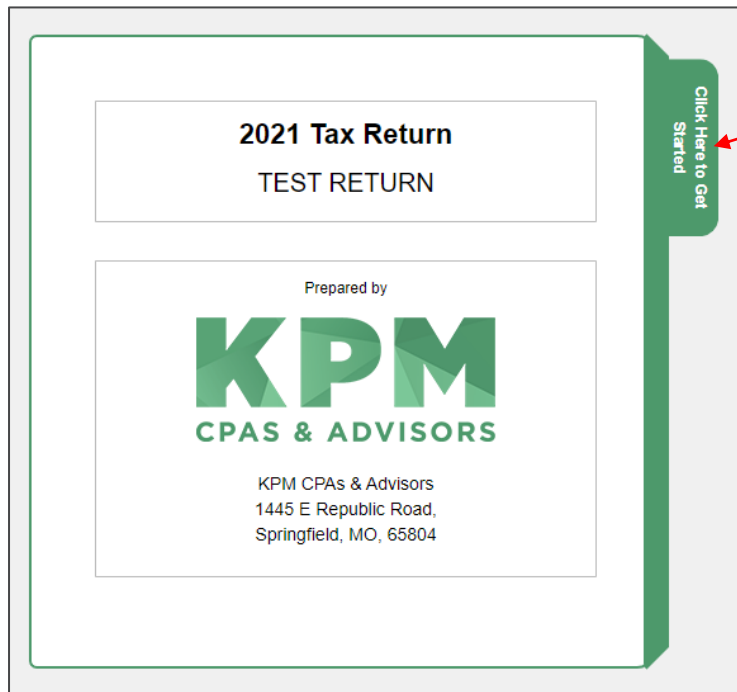
2. Partnership (Form 1065) Tax Returns: On the signature page (when e-signing your tax return), you must enter your job title within the business. In some cases, a title will pre-generate, however, you still need to enter a job title.
3. Business (Form 1065 & 1120S Tax Returns): You need to initiate the emails to your business partners containing their Schedule K-1s, and detailed instructions are listed in steps eight and nine of the instructions below.

### How To Access Your Tax Return Via SafeSend:

1. When KPM uploads your return via SafeSend, you will receive an email, which will look like this:



2. Please note, the email is from **KPM CPAs & Advisors** but has a sender email address of **noreply@safesendreturns.com**.
3. Click the link within the email.
4. Select 'Click Here to Get Started' on the tax return booklet that opens.



5. Select 'Request Access Code' and a one-time access code will be sent to your mobile phone number.

Authentication

**Mobile Access Code Required**

Please select "Request Access Code" and we will send you a one-time expiring access code to your mobile device number: {xxx}xxx-7343

If the mobile device number is incorrect please contact your Tax Professional.

[Request Access Code](#)

Enter access code here:  (This code will expire in 20 minutes)

[Continue](#)

6. Once the access code is received, enter it in the 'Enter access code here' field and click 'Continue.'

Authentication

**Mobile Access Code Required**

Please select "Request Access Code" and we will send you a one-time expiring access code to your mobile device number: {xxx}xxx-7343

If the mobile device number is incorrect please contact your Tax Professional.

[Request Access Code](#)

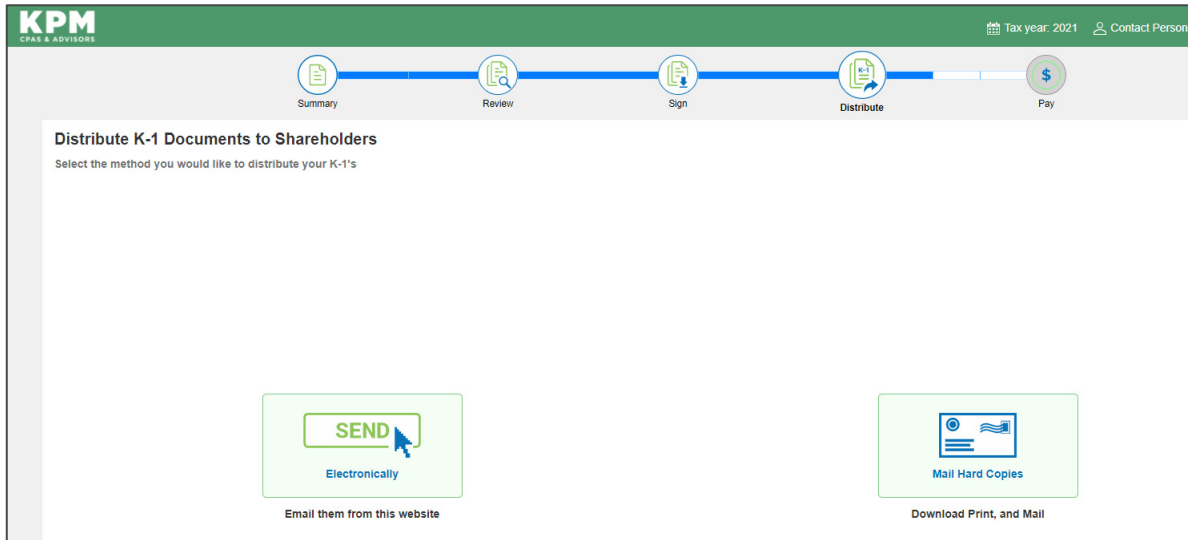
Enter access code here:  (This code will expire in 20 minutes)

[Continue](#)

7. After the access code is successfully entered, follow the prompts to review your tax return, sign electronic filing documents, review payment information, and (for business returns) forward Schedule K-1s to your business partner(s). *Note: We cannot electronically file your tax return until your Form 8879 is signed.*

The screenshot shows the KPM CPAs & Advisors interface for the 2021 tax return. At the top, there is a navigation bar with the KPM logo and the text 'CPAs & Advisors'. On the right side of the navigation bar, it says 'Tax year: 2021' and 'Contact Person'. Below the navigation bar is a progress bar with five steps: Summary, Review, Sign, Distribute, and Pay. The 'Summary' step is currently selected. The main content area is titled '2021 Tax Return' and shows 'No Refunds or Payments Due'. Below this, there is a large green button that says 'Click Here to Begin'. In the center of the page, there is a message: 'Welcome TEST RETURN Your 2021 tax returns are ready! Please follow these easy steps so your taxes can be filed.' Below this message are three icons with labels: 'Review Documents', 'Sign Documents', and 'Distribute K-1s'.

- For business returns only, you can choose to distribute Schedule K-1s to your business partner(s) by emailing from SafeSend or printing paper copies to mail.



- To email Schedule K-1s, click the link to 'Email them from this website.' For every shareholder/partner, you will need to enter their email address by clicking the 'Edit Details' button for each person.

Select Shareholders to Email					Search Shareholders
<input checked="" type="checkbox"/>	Shareholders	Email	Mobile	Status	Action
<input checked="" type="checkbox"/>	TEST SHAREHOLDER			Not Sent	<input checked="" type="checkbox"/> <input type="checkbox"/> <a href="#">Edit Details</a>

- Enter their email address and click 'Save.'

**Update K1 Shareholders Details** ✕

Name: TEST SHAREHOLDER

SSN/EIN: \*\*\*\*\*5555

Address: Address

Email:  ↖

Mobile: Select | ( ) -

Partner Type: Individual | ▾

Status: Pending | ▾

Send update notification email to KPM CPAs & Advisors

- Click 'Email Documents' to initiate the email to your business partner(s).