LOMNESS CPA
TAX & ACCOUNTING SERVICES

Introducing **SafeSend**, a secure, effortless, and reliable online portal that streamlines your tax experience with Lomness CPA!

SafeSend

- Upload important tax documents and organizers
- Review and e-sign your tax returns in just a few clicks
- Experience a seamless portal for all your document needs
- Benefit from bank-level security for every file you send us

Tax season—and every season—just got easier, faster, and safer!

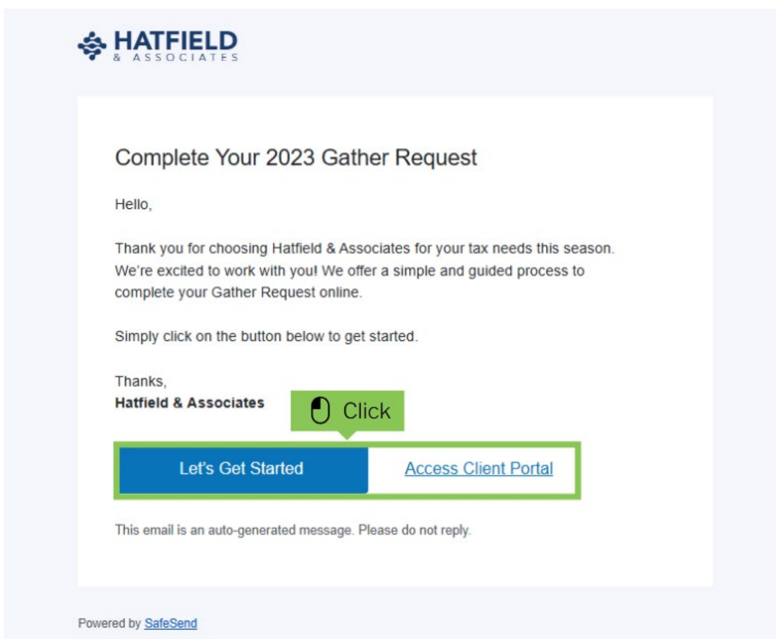
Table of Contents

🗂️ Tax Organizers (also called "Gather Requests")

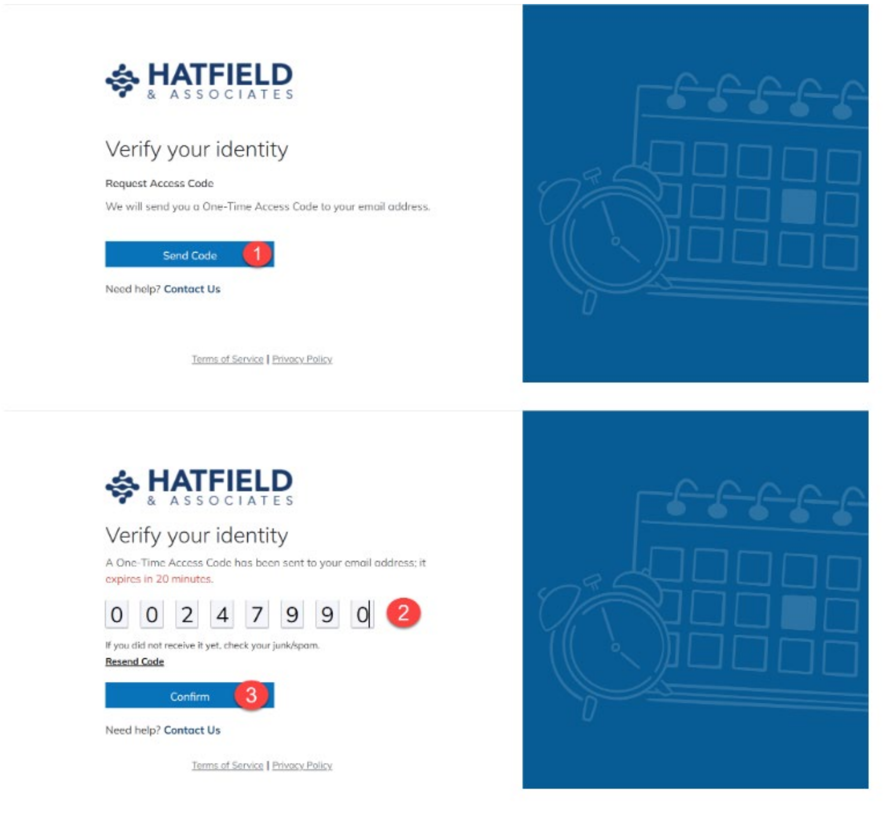
Each year, once you sign your engagement letter in Ignition, you will receive a link to your tax organizer emailed from NoReply@SafeSendReturns.com. This link will include a personalized questionnaire and a customized list of documents to upload, ensuring you know exactly what to provide.

How to Complete Your Tax Organizer (for Personal Tax Returns Only):

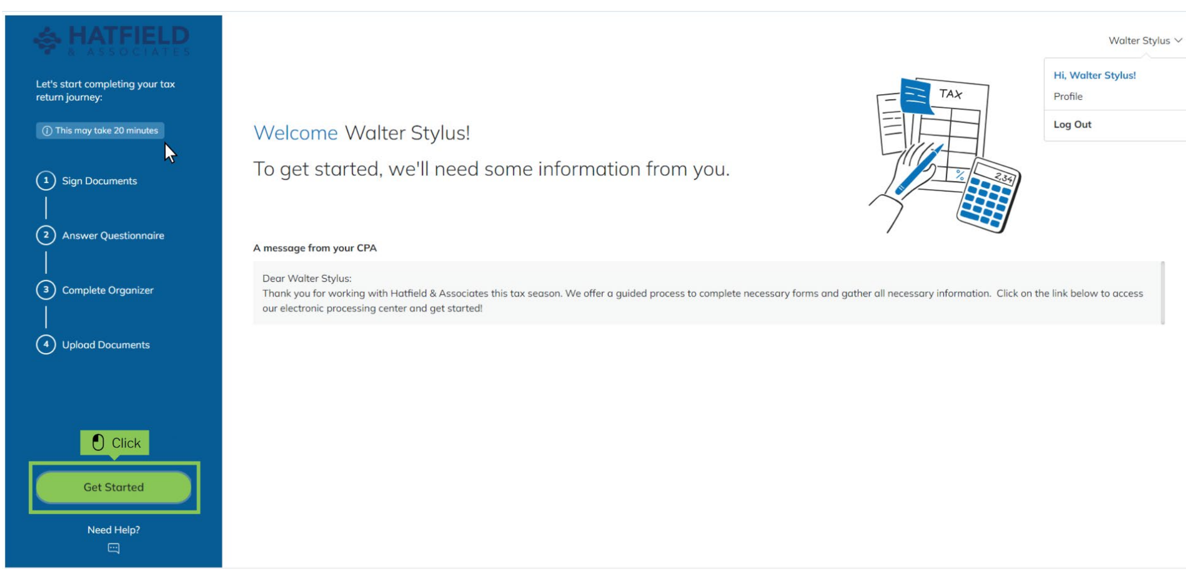
1. Sign your proposal in Ignition.
2. Check your inbox: Look for a SafeSend email from NoReply@SafeSendReturns.com.
3. Access your organizer:
    - ⭐ Recommended: Click **Access Client Portal** (*see registration steps on page 6*).
    - Or click **Let's Get Started**.
    - ⚠️ Please avoid simultaneous access with your spouse!



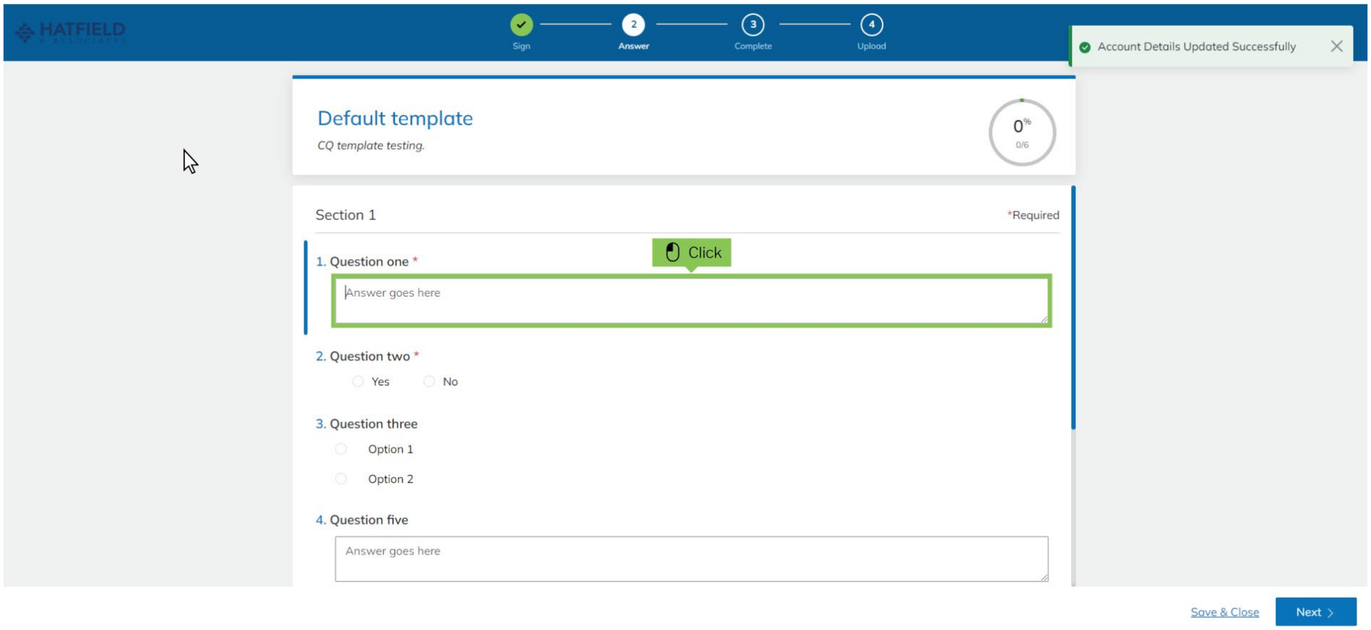
4. Verify your identity:
    - Click **Send Code**
    - Retrieve the 6-digit code from your email and enter it (code valid for 20 minutes).
    - *See Tips & Tricks on page 5.*



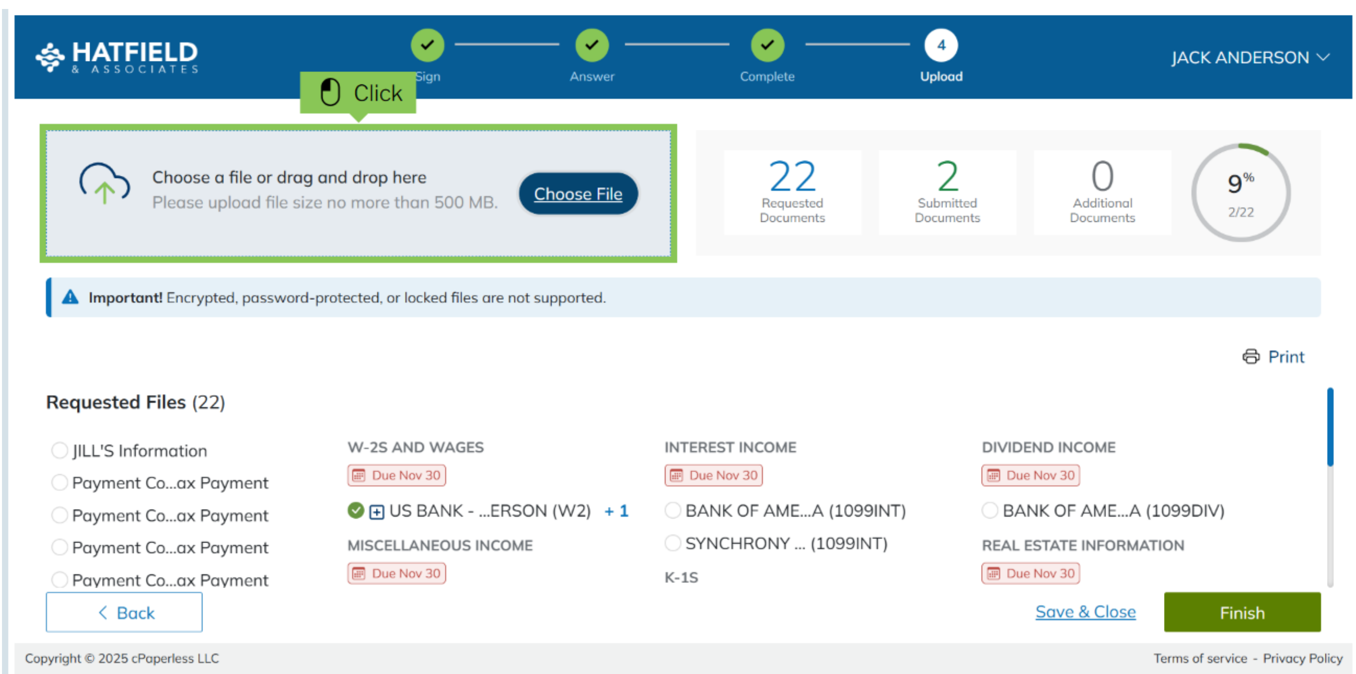
5. Click **Get Started** to complete your organizer:



- **Sign** any additional documents.
- **Answer** the tax questionnaire – required for compliance purposes.
  - Click **Save & Close** to save progress.
  - Click **Next** to complete and lock.



- Upload your supporting tax docs (custom list provided, <u>but you may add more</u>). <u>Please upload ALL documents you want us to review for your return.</u>



- *See Tips & Tricks on page 5.*

6. Click **Finish** to submit.

   - <u>**Don't skip this step!**</u> If you do not click **Finish**, your organizer will remain pending, and your return will be delayed. Once you hit finish you will not be able to open the organizer again.

💡 Tips & Tricks: Tax Organizers – Click here to watch a video guide!

Issue	Solution
Access Code (valid for 20 minutes)	• Delivery may take up to 3 minutes. • If you don't receive it in 5 minutes, call us at (281) 962-0310.
Browser	• Use Chrome, Firefox, Edge, or Safari. • Internet Explorer is NOT supported. • Clear browser cache – **click here** for a guide.
Devices	• Use a computer (not a phone/tablet).
Itemized Deductions (including but not limited to)	• Charitable donations • Medical expenses • Mortgage interest • Property taxes • Closing statements • Major purchase receipts, etc.

Uploading Docs	• **Acceptable**: PDF, Word, Excel, JPEG.
	• **Not Accepted**:
	  ○ Password-protected or encrypted files
	  ○ HEIC (live photos)
	  ○ Apple: Pages/Numbers
	  ○ File names >200 characters
	• **Questions**: See our **Tax Return Document Checklist**.

Troubleshooting	• Watch a video tutorial here. • Please avoid simultaneous access with your spouse. • Check spam or junk for SafeSend emails. • Add NoReply@SafeSendReturns.com to your safe sender list. • Need more help? Email Operations at Info@LomnessCPA.com or call (281) 962-0310.

🔐 Client Portal (Powered by SafeSend)

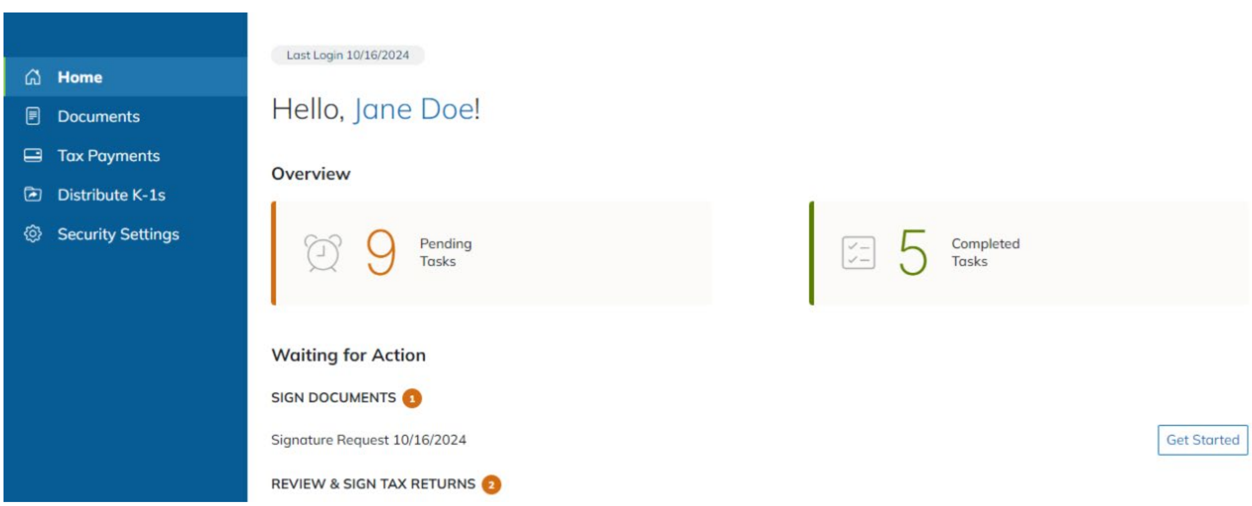
Your central hub to view, e-sign, upload or download documents, make payments, distribute K-1s (businesses only), and update settings.

🔗 How to Register

1. Open the email from NoReply@SafeSendReturns.com and click **Access Client Portal**.
2. Click **Sign Up**, enter your name and email address, then click **Verify your email**.
3. Enter the 6-digit access code sent to your email.
4. Create a 6-digit numerical PIN (needed for future logins on different devices or browsers).
5. Click **Create Account** and log in!

🏠 Portal Home Page Features

- Review and e-sign tax returns and complete other pending tasks all in one place
- View and manage upcoming tax payments from the **Make Payments** dashboard
- Securely send/receive files, search, filter, and sort documents
- Distribute K-1s (businesses only)
- Manage security settings
    - Update your email address or 6-digit PIN
    - Merge multiple email addresses into one account



💡 Tips & Tricks: Client Portal – Click here to watch a video guide!

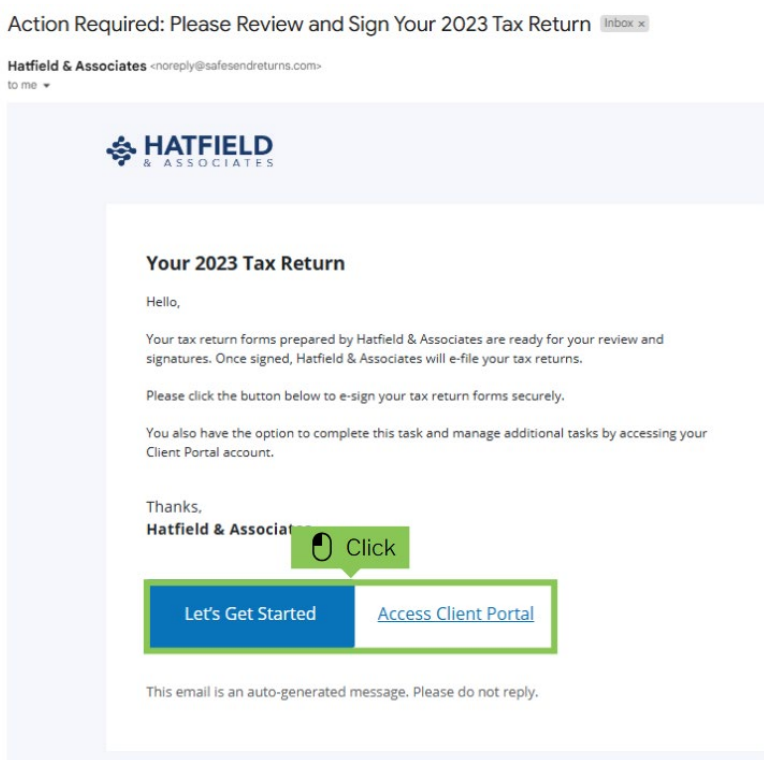
Issue	Solution
Browser	• Use Chrome, Firefox, Edge, or Safari. • Internet Explorer is NOT supported. • Clear browser cache – **click here** for a guide.
Devices	• Use a computer or a tablet (not smartphones).
Login	• Merged emails cannot be used to login. • Each address can only be linked to one Client Portal. • Access on a new device/internet browser requires use of your PIN.
Uploading Docs	• **Acceptable**: PDF, Word, Excel, JPEG. • **Not Accepted**: ○ Password-protected or encrypted files ○ HEIC (live photos) ○ Apple: Pages/Numbers ○ File names >200 characters
Troubleshooting	• Watch a video tutorial **here**. • Check spam or junk for SafeSend emails. • Add NoReply@SafeSendReturns.com to your safe sender list. • Need more help? Contact Operations at Info@LomnessCPA.com or call (281) 962-0310.

Tax Returns

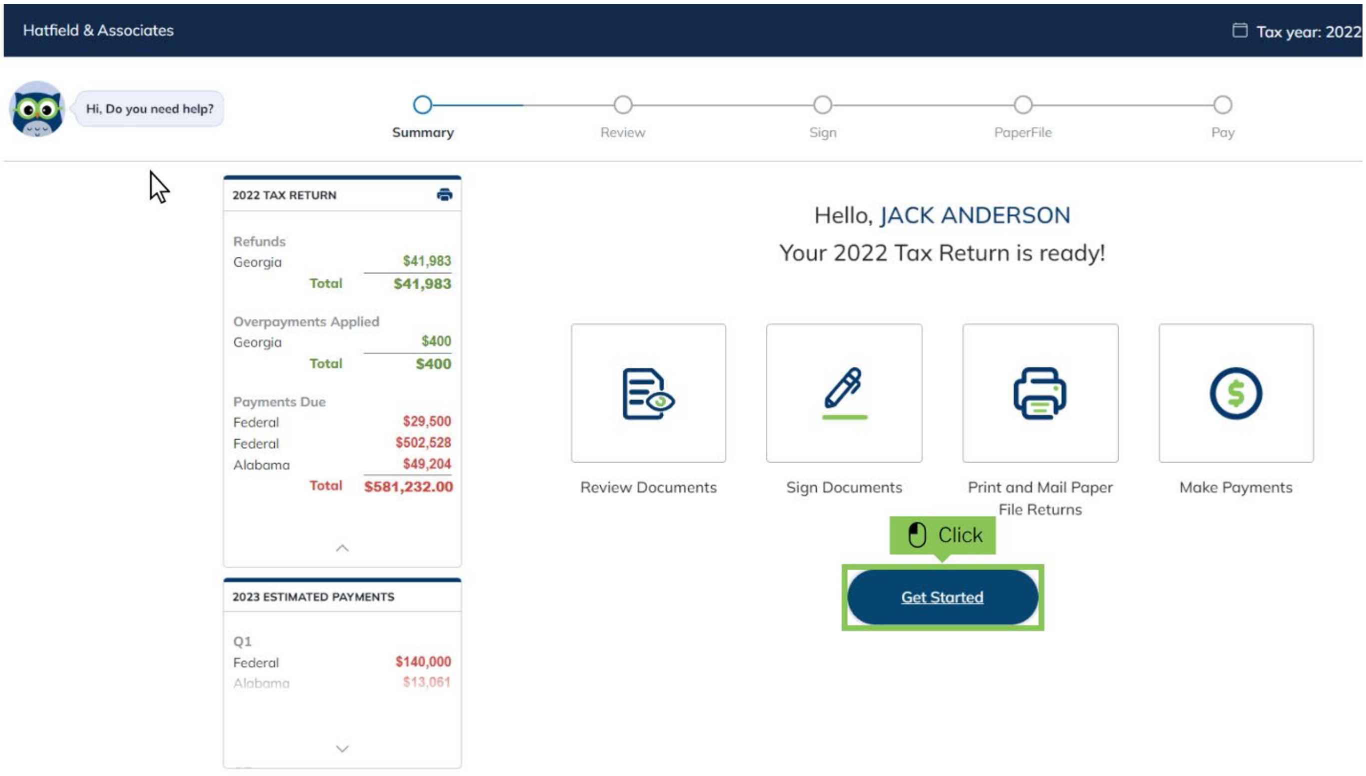
Whether it's for personal or business taxes, SafeSend offers an intuitive, user-friendly experience for reviewing and signing off on your tax return, paying your taxes, and securely distributing K-1s if you are a business owner — all in just a few simple steps!

How to View & Sign Your Tax Return

1. Open the NoReply@SafeSendReturns.com email.



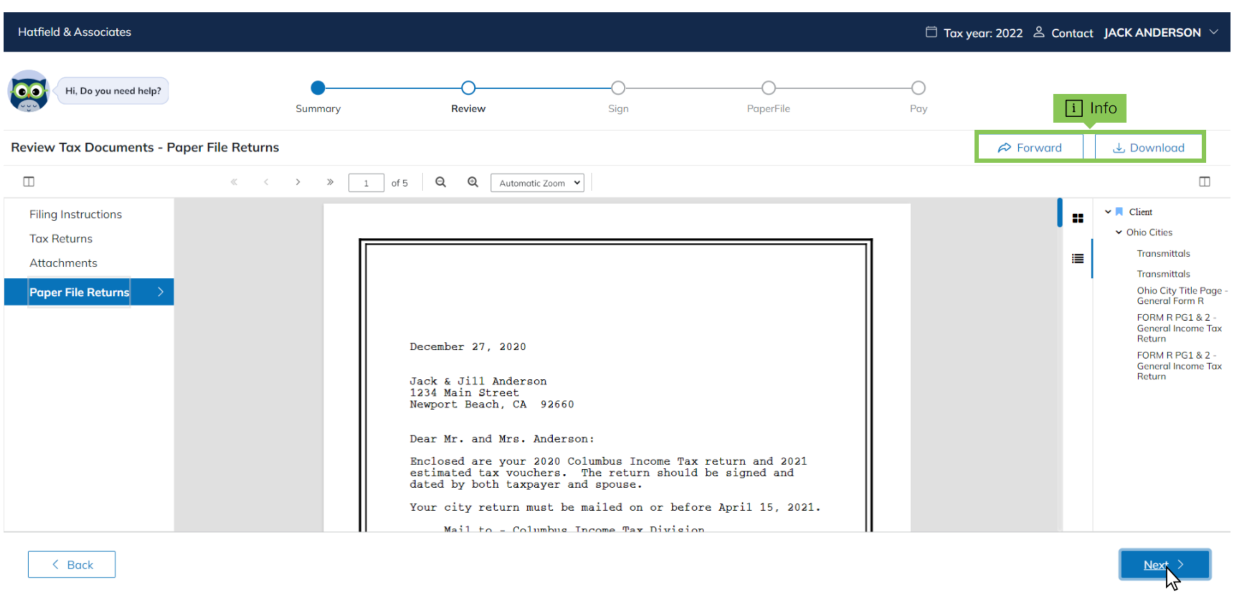
2. Recommended: Use the **Client Portal** (see registration steps on page 6); or click **Let's Get Started**.
3. Verify Your Identity: Enter the requested 4 digits of your SSN, then enter the 6-digit access code.
4. Review Your Return:
    - Use the dashboard to check your progress, review refund or payment details, and review all pages of your return.



5. To Review and Sign Your Return click **Get Started**:

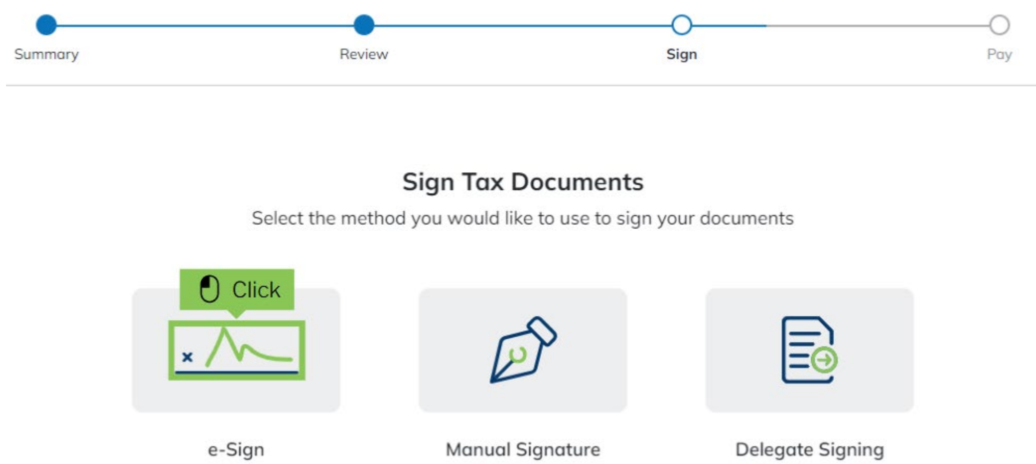
   - **Summary:** Message from our Firm. Please click the **Next** button in the bottom right-hand corner to review your return.

   - **Review:** Here you can review your return by navigating on the left side panel. You can also click at the top right **Download** so you have a copy of your return downloaded to your computer. By clicking the **Forward** button, you can forward your return to a third party. Once you are ready to sign click the **Next** button in the bottom right-hand corner.

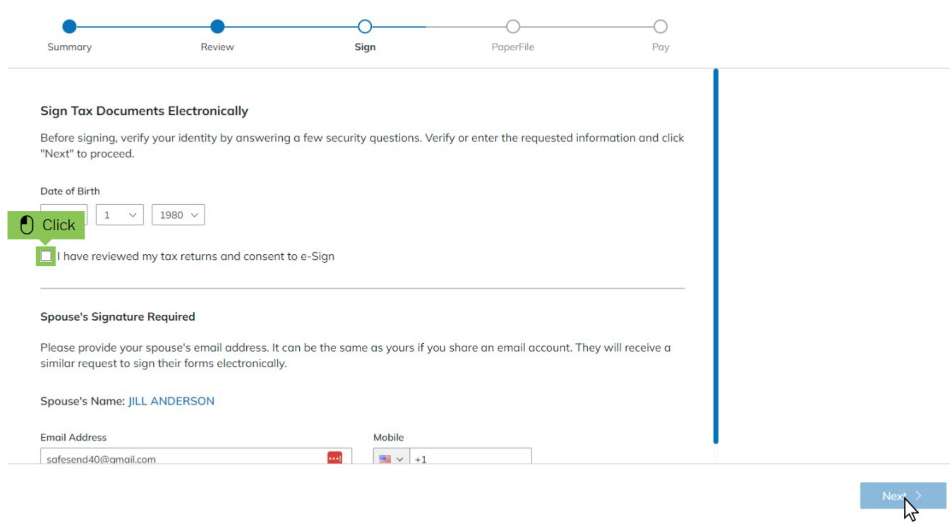


6. Options to Sign Tax Documents

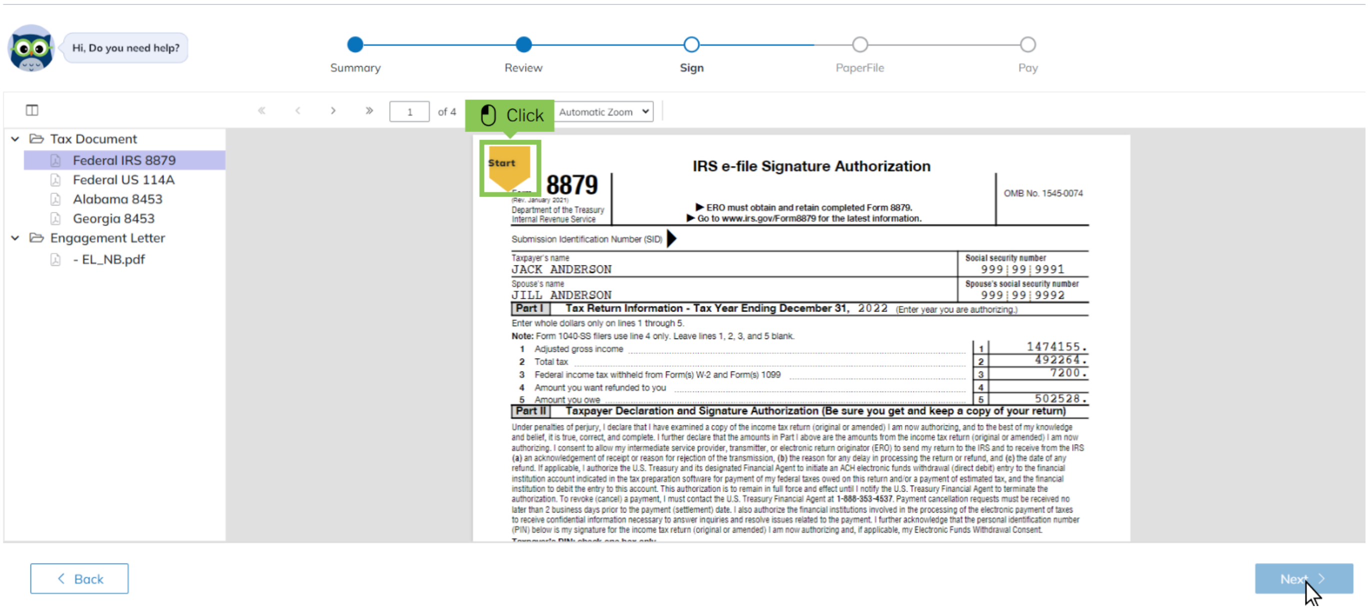
    - **E-sign (Recommended) :** For personal returns only, answer security questions (IRS required). If you fail, you must manually sign and upload.
    - **Manual Sign:** Download, print, sign, scan, and upload your signed return.
    - **Delegate Signing:** For Business Returns you can delegate the signature.



7. Security Questions
    - The security questions are required by IRS for e-signatures and cannot be bypassed unless you manually sign your return.
    - The security questions are not controlled by Lomness CPA or SafeSend.
        - If you or your spouse fails the KBA questions, **you will both be required to manually sign per IRS regulations.**



8. Sign Tax Documents
    - Click the **Start** button to start signing off on the documents. Once you had signed off all the documents click the **Next** button in the bottom right-hand corner.

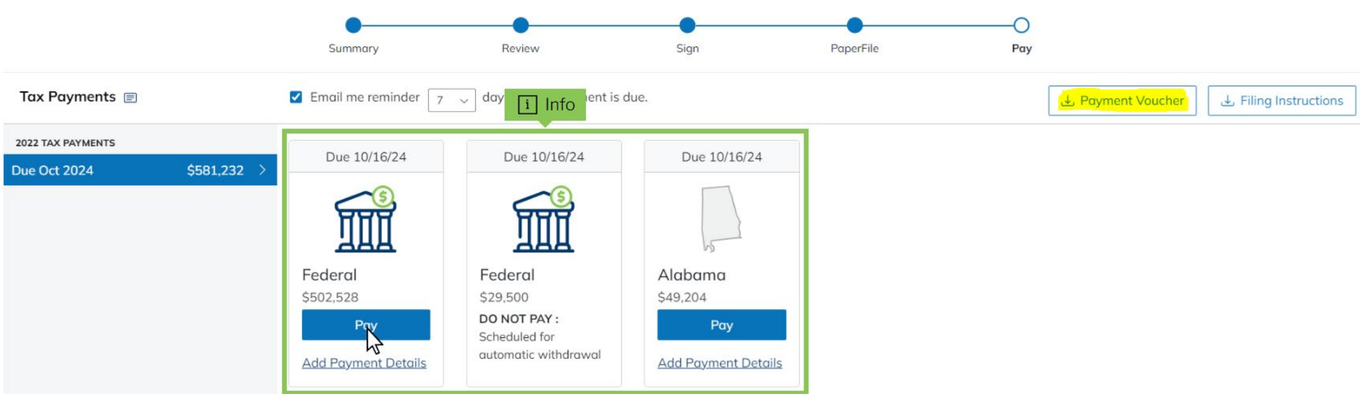


9. For Businesses: Distribute K-1s

- **Electronically**: Send K-1s by email to shareholders.
    - i. Click **Edit** to add or update your shareholders' email addresses, then click **Save**.
    - ii. Send in bulk by clicking **Email Documents** in the upper right corner of the page.
- **Mail Hard Copies**: Download in bulk or individually and print for mailing.

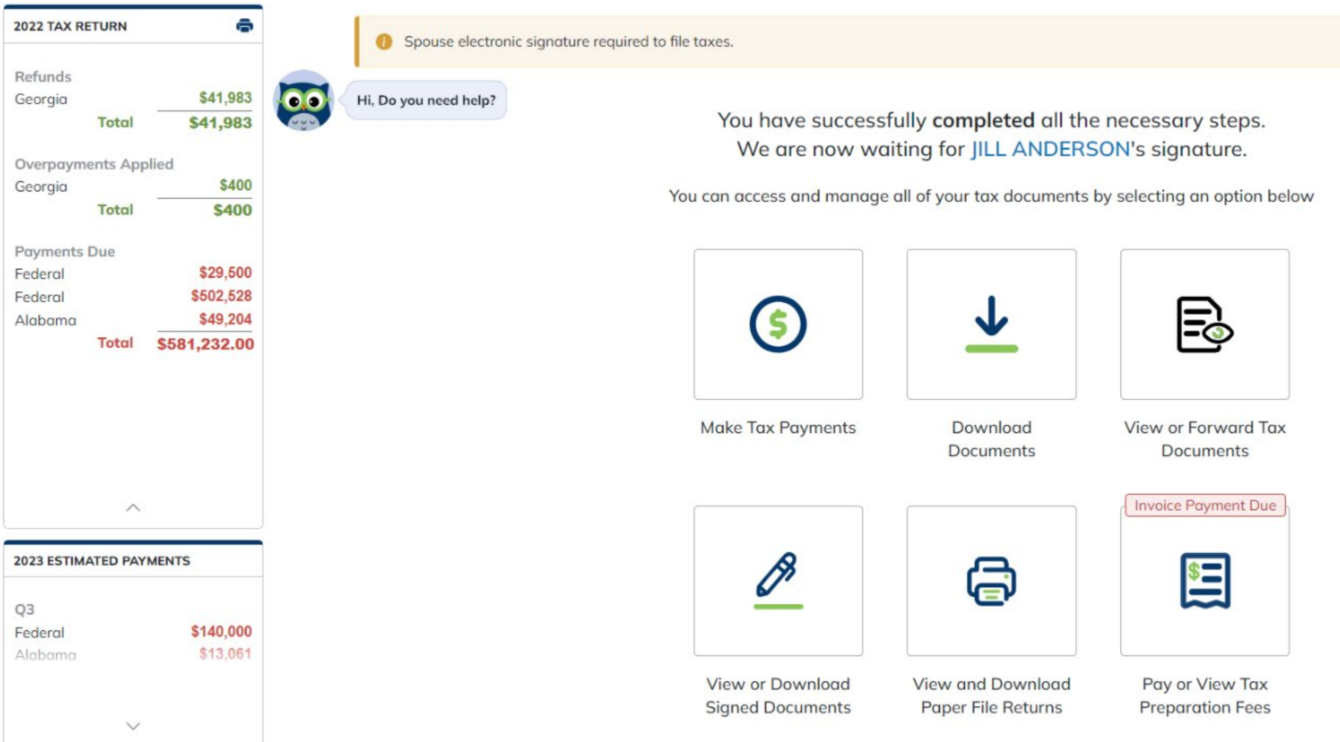
10. View and Manage Tax Payments (includes federal and estimated as applicable):

- Click **Pay** to make the tax payment right now. You can either pay online (Recommended) or download the voucher to mail in your payment. We
- Download **payment vouchers** and **filing instructions**.
- Mark payments as paid (for your records only – this does not process or confirm payment with the taxing authority such as the IRS).



11. Dashboard

- Once you have signed your return, our team will e-file your return. Access the tax return dashboard anytime from the client portal or through the secure link emailed from SafeSend.



💡 Tips & Tricks: Returns – Click here to watch a video guide!

Issue	Solution
Access Code *(valid for 20 minutes)*	• Delivery may take up to 3 minutes. • If you don't receive it in 5 minutes, call us at (281) 962-0310.
Browser	• Use Chrome, Firefox, Edge, or Safari • Internet Explorer is NOT supported. • Clear browser cache – click here for a guide.
Devices	• E-sign on computer, tablet, or phone. • Manually sign or download only from a computer.

Issue	Solution
Forward Return	• SafeSend allows you to securely forward a copy of your tax return to a third party (i.e., financial advisory, mortgage lender, attorney). • Per IRS regulations, any requests for Lomness CPA to share your tax information with a third party will **require** a signed disclosure form provided by our firm.
K-1s	• Business owner is responsible for K-1 distribution. • Can be done electronically or manually. • If the shareholder **declines** to consent to receive their K-1 package electronically, you will receive an email notification. You will then be **required** to mail a hard copy to the shareholder.

KBA (Knowledge-Based Authentication)	• The security questions are required by IRS for e-signatures and cannot be bypassed unless you manually sign your return.
	    o generated from a third party's database.
	        ▪ This process does not access or impact your credit report. The third party does not have access to your taxpayer information.
	• The security questions are not controlled by Lomness CPA or SafeSend.
	• If you or your spouse fails the KBA questions, **you will both be required to manually sign per IRS regulations.**

Manual/E-Sign Reset	• Accidentally chose manual sign? Email Info@LomnessCPA.com for a reset. ➢ This will not work if you failed the KBA questions.

Married Filing Joint	• Returns go to the primary taxpayer first.
	• The spouse receives their signatures link once the primary taxpayer has signed the return.
	    ➢ Designed to remain in compliance with the IRS regulations requiring separate signatures from each spouse when filing married jointly.
	    ➢ Parallel signing is not currently available.

Issue	Solution
Payments	• You are responsible for submitting/initiating all payments. • Neither Lomness CPA nor SafeSend processes or tracks your tax payments with taxing authorities such as the IRS. • Entering your payment details into SafeSend is for record-keeping purposes only and does not process / confirm payment with the IRS.
Questions	• Email Tax@LomnessCPA.com with any tax return questions.
Troubleshooting	• Watch a video tutorial here. • Check spam or junk for SafeSend emails. • Add NoReply@SafeSendReturns.com to your safe sender list. • Need more help? Contact Operations at Info@LomnessCPA.com or call (281) 962-0310.

Best Practices & Final Reminders

- Always click **Finish** after completing your organizer.
- Save your tax return to your computer after e-signing.
- Contact us with any questions!
    - Info@LomnessCPA.com
    - Tax@LomnessCPA.com