MUHLENKAMP & ASSOCIATES, LLC
CERTIFIED PUBLIC ACCOUNTANTS

SafeSend Returns

WHAT IS SAFESEND RETURNS?

SafeSend Returns is a secure, paperless platform that streamlines the final steps of tax preparation—assembling, delivering, and collecting e-signatures—so you can quickly and easily complete everything from home with just a few clicks.

HOW IT WORKS:

(1) SEND TAX DOCUMENTS

Securely send us your tax and accounting documents - visit our website, Muhlcpa.com, and select 'Send Files Securely' in the top right corner or use the link in your emailed organizer. See upload tips below.

(2) WATCH FOR AN EMAIL

Once your tax return is ready, you'll receive an email from noreply@safesendreturns.com with a secure link to access your completed tax return from Muhlenkamp & Associates.

(3) AUTHENTICATE

Click the link and enter the last four digits of your Social Security number to review your return (individual returns only).

(4) VERIFY IDENTITY

SafeSend will send you a one-time access code by email or text. The code is valid for 20 minutes. If it expires, simply request a new one to continue. If you choose email, be sure to check your spam or junk folder if the code doesn't appear.

(5) REVIEW & SIGN

Answer three questions to verify your identity and sign your authorization forms (8879). If filing jointly, both spouses must sign. **After all signatures are completed, Muhlenkamp & Associates will be notified and will e-file your returns.**

(6) DOWNLOAD OR PRINT

Download or print your completed tax documents. You now have secure access to your completed tax documents for up to 7 years, whenever you need them.

BENEFITS OF USING SAFESEND RETURNS

- Receive your tax returns securely without the need to set up an account or remember a password.
- Electronically sign your federal and state e-file authorizations (8879). No printing or mailing necessary.
- Accessible on: computer, smartphone, or tablet (works best on a computer).
- Receive payment reminder e-mails.
- Download a copy of your tax return.
- For businesses: conveniently distribute your K-1s electronically.

SECURE DOCUMENT UPLOAD TIPS

- PDF is the preferred format for uploading tax documents (3GB maximum). Suggest I-phone notes for 1-2 page scans.
- When using a scanning app, choose one that supports multi page PDFs & Encryption. (e.g. Adobe Scan)

Frequently Asked Questions

Individuals

Businesses

Scan the QR Codes for a quick tutorial of the Client Experience for both individual and business tax clients.

For best viewing, use a computer. If using a smartphone use horizontal view and swipe to advance.

See our website (www.muhlcpa.com) for URL links to these videos and FAQ.