

Important Reminders for DocuSign Clients,

If you request **DocuSign**, you will *not* receive a paper copy of your tax return as it gets sent to you **electronically** along with your signature pages—you will need to download and **save a copy for your records**. If you don't do this at the time of signing, your login does expire within 90 days for security purposes and you will not be able to access it.

If you need a paper copy, *you must request one* when you meet with your tax preparer. If you call in and request a copy after using DocuSign, you will be charged a service fee of \$25 for having to print out, assemble and mail to you or \$15 for us to email you a copy in PDF format.

We will not file your tax return automatically. If you didn't pay our fee at your appointment, you will receive a call for payment. Then we will send the DocuSign email and once we receive your signature pages, we will efile them.

If married and filing jointly **both you and your spouse will receive separate emails for signatures**—once both parties have signed, then DocuSign generates the completed forms with both signatures and sends it to us automatically.

If you have changed emails, **make sure we have your updated email address(es)**

To Sign your Tax Return:

Step 1: Look for an email from Accurate Tax with a subject saying: "ACTION NEEDED:

- Open the email and click the big **purple button** that says "**Review Documents**"

Step 2: You'll be taken to the DocuSign website.

- Click the "**Continue**" button at the top.

Step 3: Add Your Signature

- Click the "**Start**" button – DocuSign will guide you.
- When you get to a purple "**Sign Here**" tag: Click on it.
 - A window will pop up. Choose:
 - **Draw** your signature with mouse OR **Select** a pre-made one.
 - Click "**Adopt and Sign**"
 - Repeat if there are more signature boxes.

Step 4: Finish Up

- Once all signatures are complete, click the "**Finish**" button at the top or bottom.
 - You're done! You'll get an email confirmation that it's completed.

Step 5: Save for Your Records (Highly Recommend)

- Click: "View completed documents"
 - On the right side of the screen, choose "Download " or "Print"
 - Save it for your tax records.