



Client Guide: Downloading Prior-Year Tax Returns via SafeSend

SafeSend provides secure and easy access to your prior-year tax returns. Follow the steps below to download your documents.

Using the SafeSend Client Portal

1. Log in to the portal using the link provided by your tax preparer.
2. Navigate to 'Documents' or 'Tax Returns' on the dashboard.
3. Select the year you need from the list.
4. Click 'Download' next to the return you want.

Tips for Success

- Prior-year returns are typically available for up to three years.
- Always download to a secure device and store in a safe location.
- Contact your tax preparer if you cannot locate your email or portal link.