



FAW CASSON
CERTIFIED PUBLIC ACCOUNTANTS • BUSINESS CONSULTANTS

To send files securely via SafeSend Exchange:

- Go to www.fawcasson.com.
- At the top of the screen, click “Send Files” on the Menu Bar.
- To send directly to a Team member, click the link to be directed to our Staff Page.
- Click the name under the Team member.
- Under their photo, click the “Send Us Your Documents” button.
- If you do not know to whom you need to send the documents, you can choose the generic office option on the main Portal screen.
- Each staff member also has a secure link in their email; you can use this link to securely send files directly.
- Enhancements to SafeSend will be coming in the future.

To send the files:

- Enter your name and email address on the left sidebar.
- Choose a tax year on the sidebar (if not tax related, choose the current year).
- In the message, type the subject line, and your message.
- Drag the files in from your Windows Explorer window or use the “Attach Files” button to browse from your computer.
- Click “Send.”
- Retrieve the One-Time Access Code from your email and click “Authenticate.”
- A green “Message sent successfully” notification should show in the top right corner.