Signing and Downloading Your Tax Returns from SafeSend

Instructions & FAQs for 1040s

You will receive a message from your Cherry Bekaert engagement team when your tax returns are ready for delivery via SafeSend. Once you receive your personal link, you can sign, download and share your returns using the following instructions.

General Support

► Use this video to understand what you will see as you go step-by-step through this process.

► Contact SafeSendSupport@cbh.com with questions regarding SafeSend.

Finding your email link

1. When your return is ready, you will receive an email from the Cherry Bekaert team, followed by a message from SafeSend Returns (noreply@safesendreturns.com). Cherry Bekaert will be named in the email.

2. **If you cannot find the email,** please check your spam folder. If you still do not see the email 24 hours after receiving notification that your return is ready from Cherry Bekaert, reach out to SafeSendSupport@cbh.com for assistance.

Accessing your account

1. Once you open your email from SafeSend, click the "Access Tax Documents" button.

2. If requested, input the last four digits of your Social Security Number.

3. Request an access code by hitting "Send Code." An access code will be emailed to you in a separate email-enter that code in the space provided.

4. Click "Get Started."

Reviewing your tax return(s)

1. All tax returns associated with your email address will be available on your Tax Return Dashboard. To open a return, choose the "Open" link under the Actions column, then click "Get Started."

2. If you have special instructions for your returns, you will see them under "A Message from Cherry Bekaert Advisory LLC" after clicking "Get Started." If there are no messages, hit "Next."

Electronically signing your return(s)

1. Click "Sign Electronically from this Website" and answer the Knowledge Based Authentication (KBA) questions provided. These questions are randomly generated from data found in public records – we do not have the questions or the answers.

2. Complete the remaining e-signature steps.

Downloading your documents

1. **If you plan to e-sign, download your documents after they are signed.** Checking the "E-file forms" box or downloading prior to signature will cause SafeSend to default to manual signature.

2. **If you have already signed your documents or plan to sign manually,** download using the "Download" button.

Note: We **strongly recommend** downloading all returns for your personal records. Links from SafeSend are active for seven years, but it is suggested that you maintain your own files for easy reference in the future.

Cherry Bekaert

Your Guide Forward