



SafeSend Product Feature Tiers

	Essential	Preferred	Premium
Tax Returns — Recognition & automated assembly / 4-Minute tax return delivery / Client completion in three steps / e-file form e-sign / Payment voucher management / Signing & payment reminders / Include invoice for billing / Tracking & reporting	✓	✓	✓
Electronic Signatures — Send individual e-sign requests / Batch process of engagement letters / KBA included (97% success rate) / Multiple signing options (electronic, manual, delegate) / Tracking & reporting	✓	✓	✓
Extensions — Recognition & automated assembly / Review only / Payment voucher management / Voucher payment reminders / Tracking & reporting	✓	✓	✓
Client Experience — Unmatched client experience / Guided processes to ensure items are completed quickly / 97% KBA success rate / Similar look and feel throughout system / No account creation or UN/PW / No username or password / Signing & payment reminders / Access up to seven years / Secure tax return forwarding	✓	✓	✓
Integrations — CCH Access / Thomson Reuters UltraTax CS / Thomson Reuters GoSystem Tax RS / Intuit Lacerte / Thomson Reuters TaxCaddy / Stripe	✓	✓	✓
Customer Support — Dedicated customer support Monday - Friday / Available Saturdays during busy season / Available Sundays before primary deadlines / In-app requests (email, chat, phone) / Self-serve help center / 95% CSAT score	✓	✓	✓
Organizers — Digital fillable organizers / Engagement letter / document e-sign / Custom questionnaire / Source document collection / Automated reminders / Tracking & reporting		✓	✓
Secure File Transfer — Secure file delivery / Secure file collection / Outlook web add-in / Automated reminders / Internal foldering structure / Team file sharing		✓	✓
Document Request Lists — Document request list / Reminders / Request templates / Tracking / Outlook web add-in		✓	✓
TTC Acrobat Preparation Tool — Tickmarks (symbol, number, letter) / Custom tickmarks / License management portal (stand alone only) / 10 key calculator with printable tape / Dynamic repagination / Create custom bookmark templates / Dynamic bookmarking / Hyperlinked cross-references / Page sign-off stamps / Adjustable ruler / Quick access to common Acrobat functions		✓	✓
Next Gen Gather with AI — Flexible gather project creation based on engagement type / Optional digital fillable organizer / Modularization / AI powered document request list (from PY organizer) / Document Request List / AI powered document recognition (on client upload) / Create custom gather templates / Robust workflow notifications			✓
API Connections — Multiple endpoints (web hooks) / Automatically download any completed or signed document / Automatically archive items when completed / Notifications of any status changes / Many more...			✓