

SIGNATURE PAD SET-UP

There are two steps that needs to be completed

1 - Open Drake eSign from the desktop

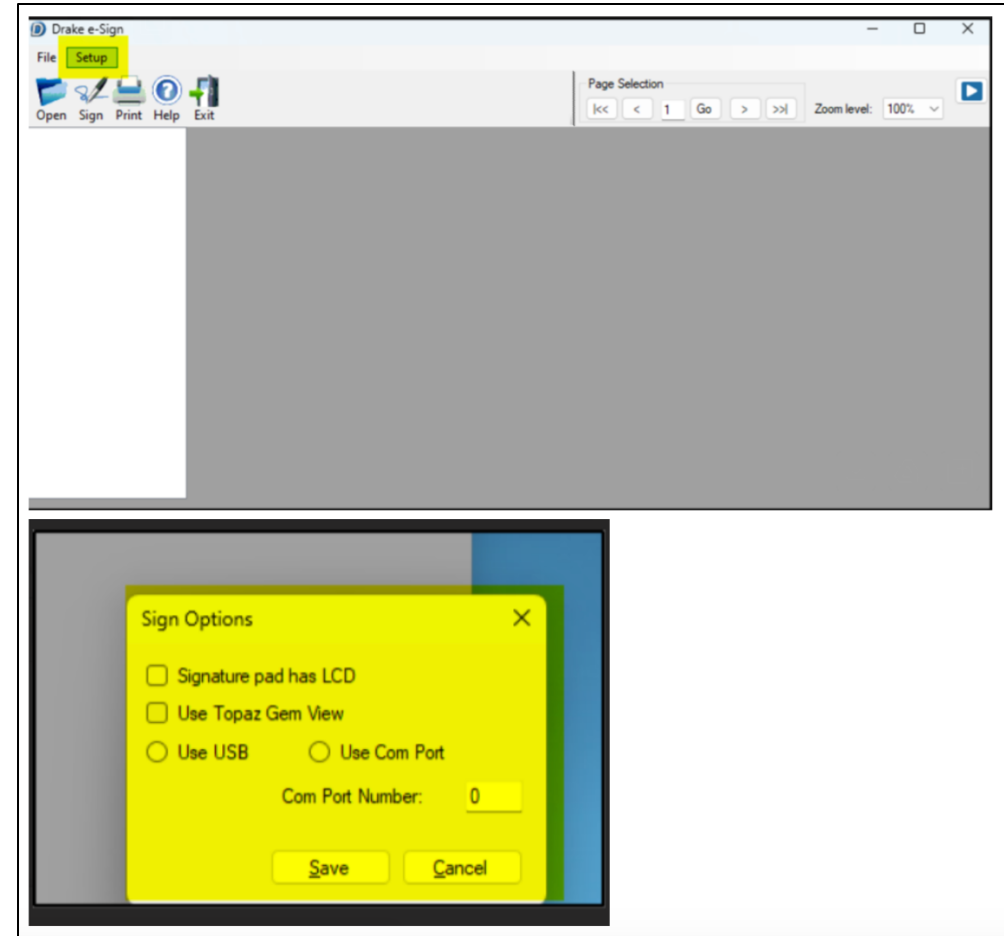


- Click Setup

Choose:

- Signature pad has LCD
- Use Topaz Gem View
- Use USB

- Click Save



2

Create a file on your computer under Documents – TAX FILE



IN STORE SIGNATURE PAD PROCESS

sunloan
and tax services

JONES, 6758

Enter form code

Form Code Guide

Taxpayer Information

Consent

Dependents

Income

Due Diligence

Deductions & Credits

Health Care

States

Balance

Return Viewing Options

Create a PDF using the options below. Once created, you can save, print, or email the PDF.

View Partial Return

View Signature Documents

Watermark Options

Client Copy

Preparer Copy

Draft

None

Create PDF

Create PDF

View Return

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JONES, 6758

Enter form code

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You Return Is Ready

You can now view and/or save a PDF copy of this return.

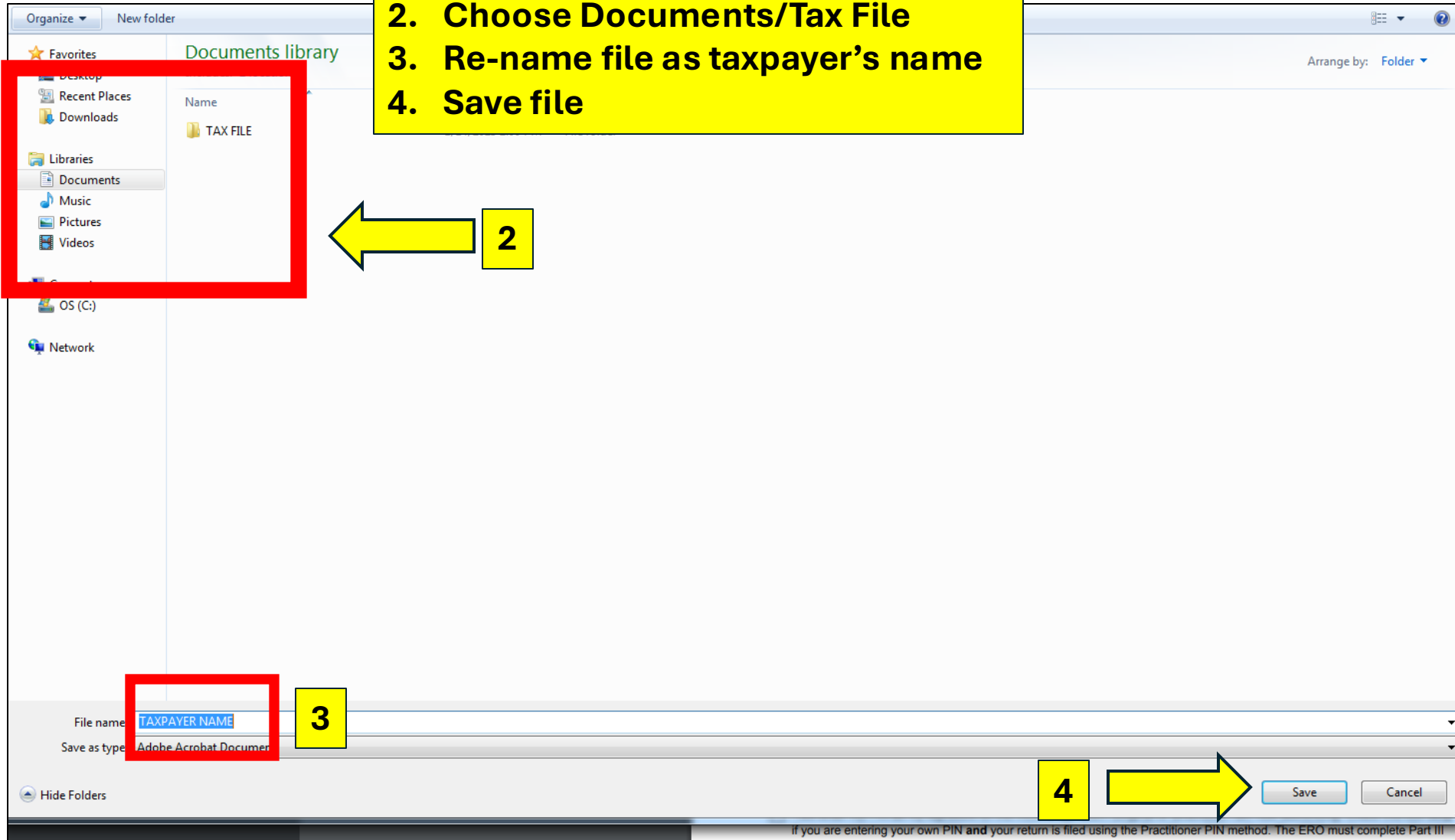
View Return

Upload to Drake Portals

Cancel

Signature pages PDF will open

1. Download file
2. Choose Documents/Tax File
3. Re-name file as taxpayer's name
4. Save file

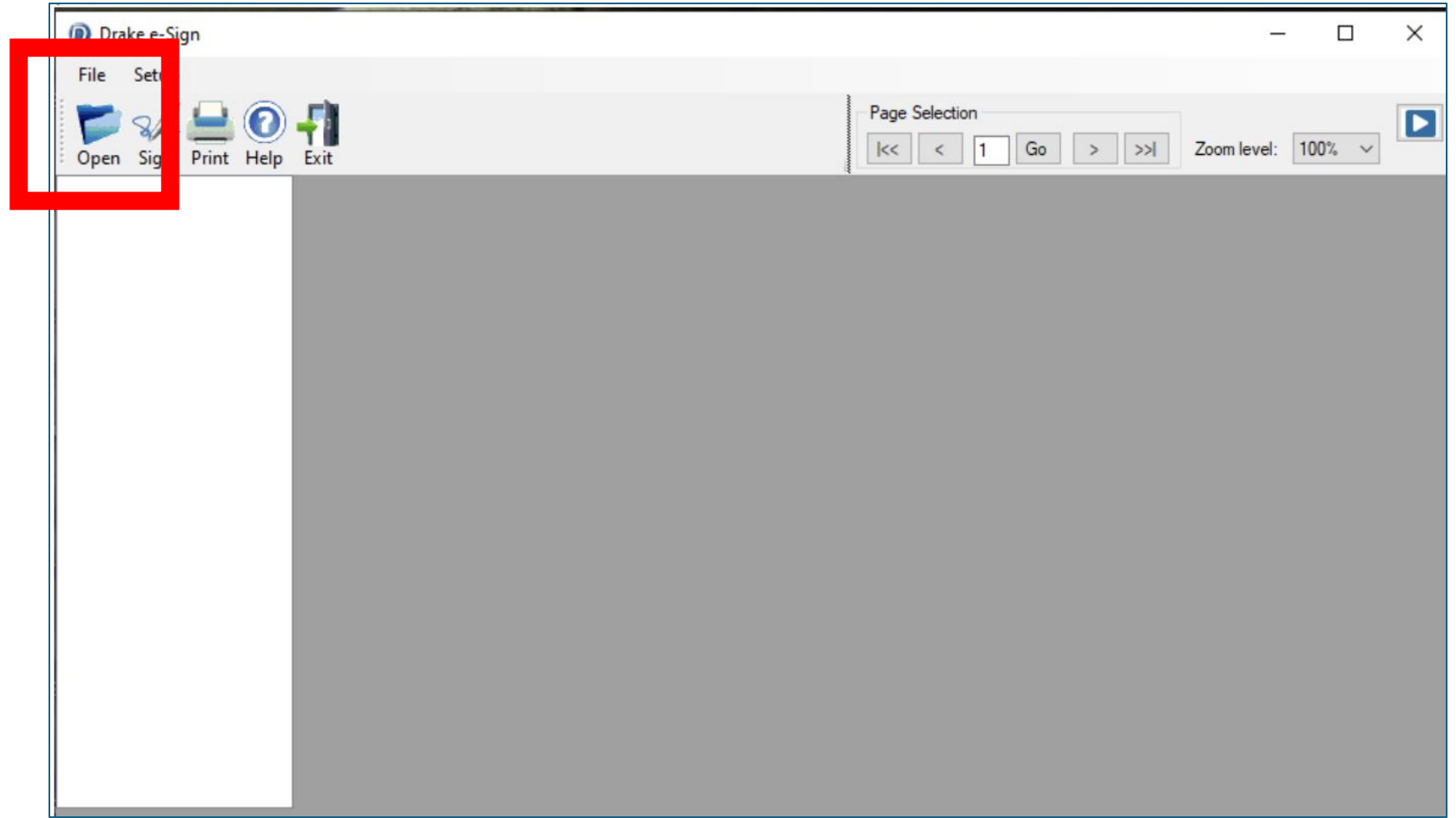


The file has been saved. Now we need the pages signed. Return to your desktop.

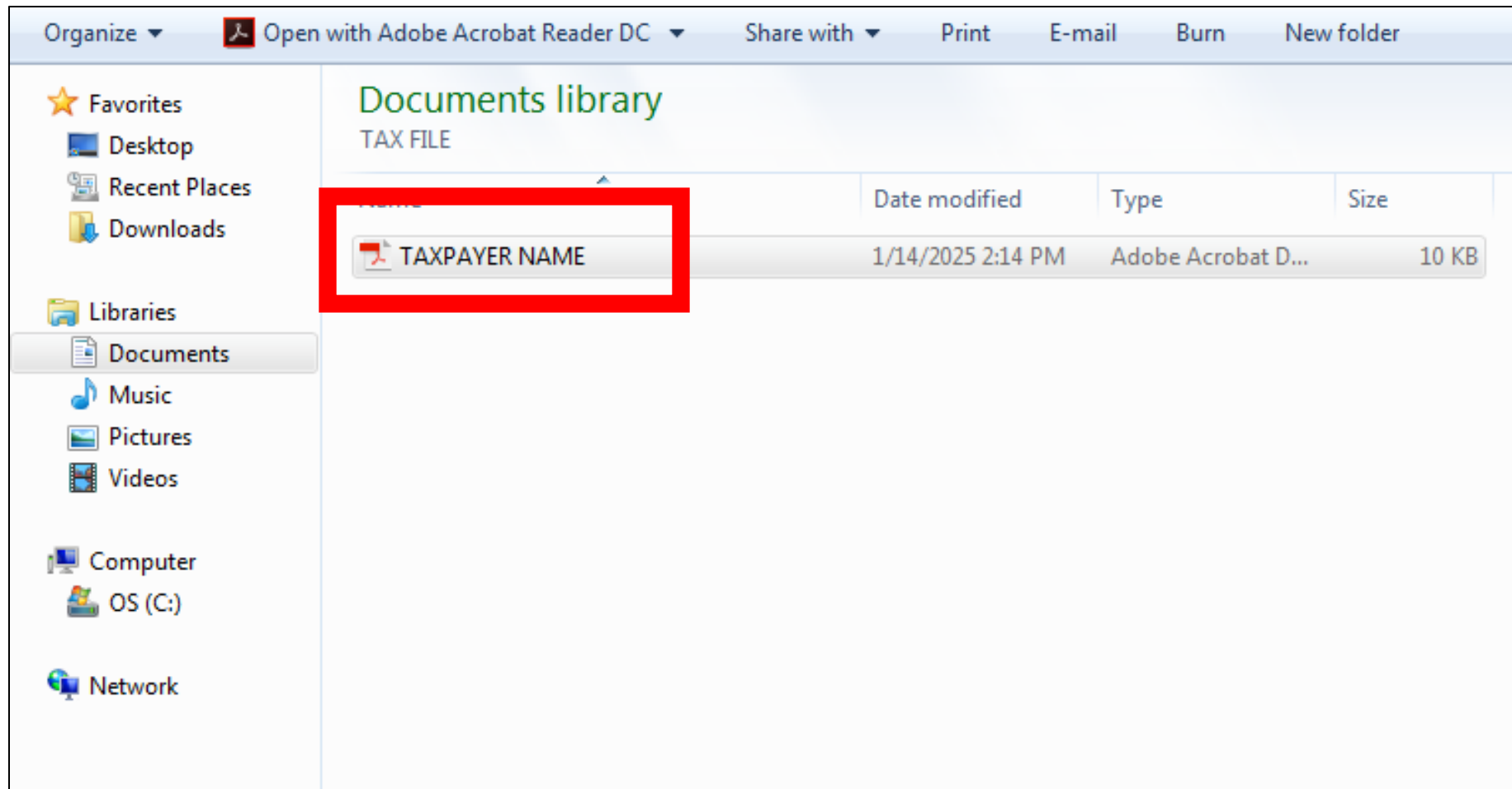
Choose “Drake e-Sign”
icon on your desktop



You will see this window click Open



1. Choose the taxpayer PDF that was just created
2. Open this file





- Unsigned - JANE DOE on 8879=2
- Unsigned - JOHN DOE on 8879=1
- Unsigned - Michelle Hoover on 8879=3

Double click the top Unsigned document

Submission Identification Number (SID) ▶

Taxpayer's name

JOHN DOE

Spouse's name

JANE DOE

Part I Tax Return Information - Tax Year Ending December 31, 2024 (Enter year you are authorizing.)

Enter whole dollars only on lines 1 through 5.

Note: Form 1040-SS filers use line 4 only. Leave lines 1, 2, 3, and 5 blank.

1	Adjusted gross income	35,000
2	Total tax	583
3	Federal income tax withheld from Form(s) W-2 and Form(s) 1099	3,500
4	Amount you want refunded to you	2,917
5	Amount you owe	

Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)

Under penalties of perjury, I declare that I have examined a copy of the income tax return (original or amended) I am now authorizing, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts in Part I above are the amounts from the income tax return (original or amended) I am now authorizing. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the ERO to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account I have provided for the payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution's authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. If I am unable to make a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be made at least 30 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of my taxes to receive confidential information necessary to answer inquiries and resolve issues related to the processing of my taxes. My personal identification number (PIN) below is my signature for the income tax return (original or amended) I am now authorizing. I am not providing an Electronic Funds Withdrawal Consent.

Taxpayer will Sign all documents on the signature pad

signature on the income tax return (original or amended) I am now authorizing.

I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. If you are entering your own PIN and your return is filed using the Practitioner PIN number, you must enter your PIN below.

Your signature ▶

Spouse's PIN: check one box only

Signature Capture

Setup

Next Clear Save Close