

SIGNATURE PAD SET-UP

There are two steps that needs to be completed

1 - Open Drake eSign from the desktop

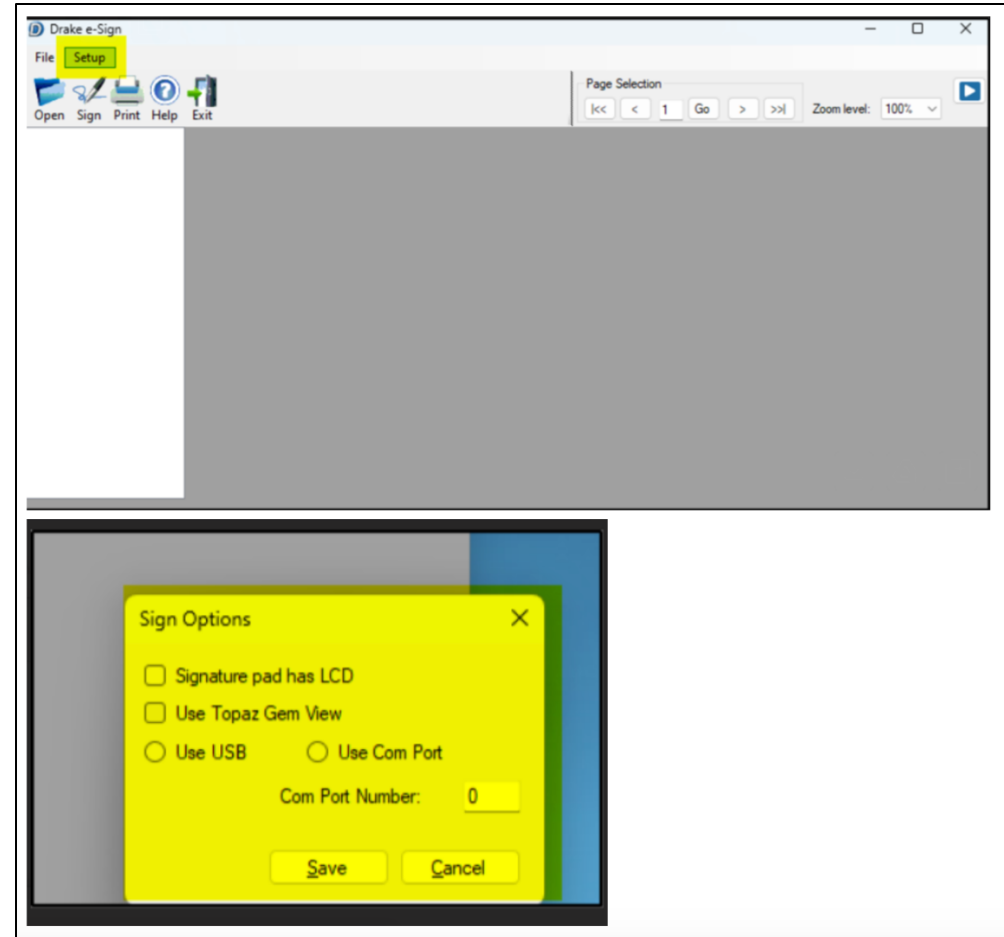


- Click Setup

Choose:

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

- Click Save



2

Create a file on your computer under Documents – TAX FILE with your store number



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

sunloan
and tax services

JONES, 6758

Enter form code

Form Code Guide

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You Return Is Ready

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

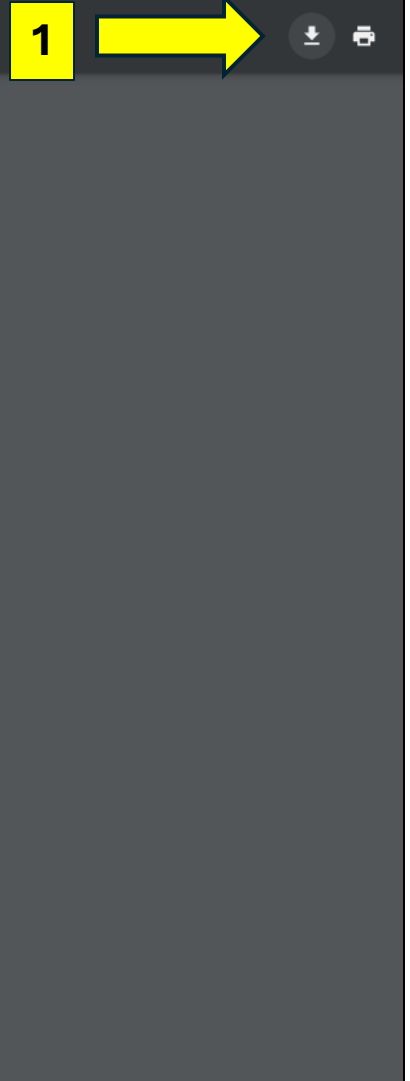
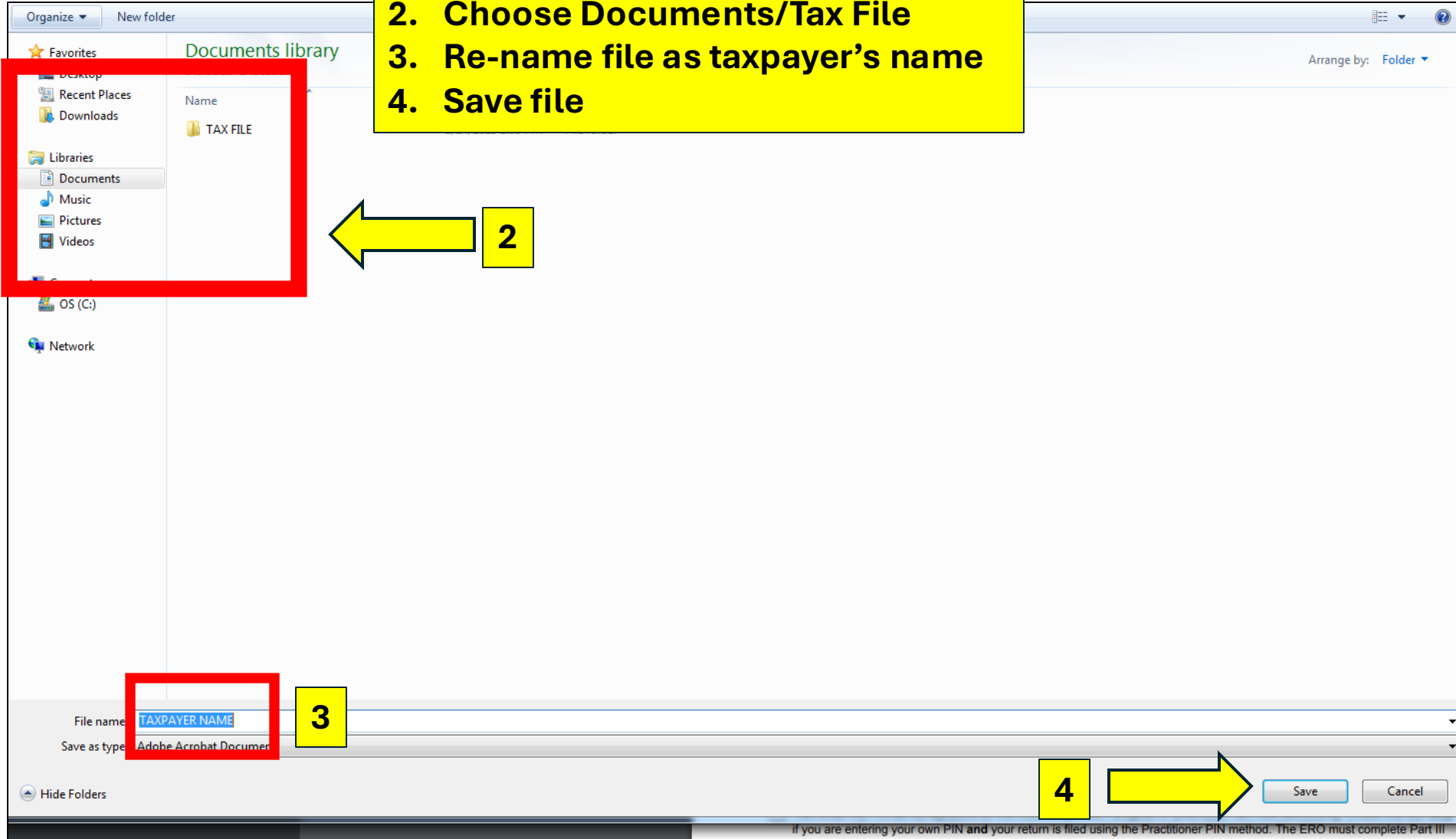
View Return

Upload to Drake Portals

Cancel

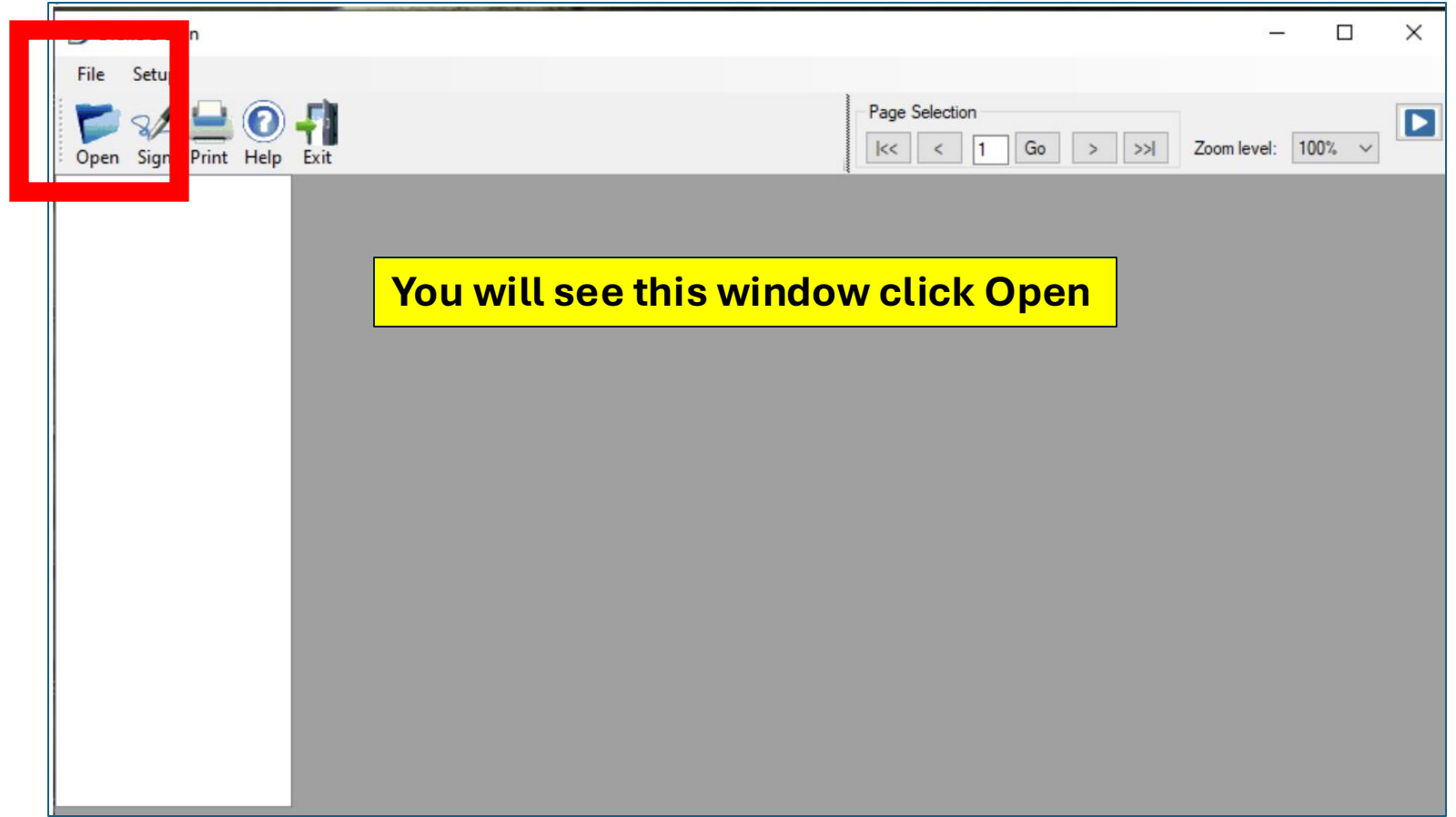
Signature pages PDF will open

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



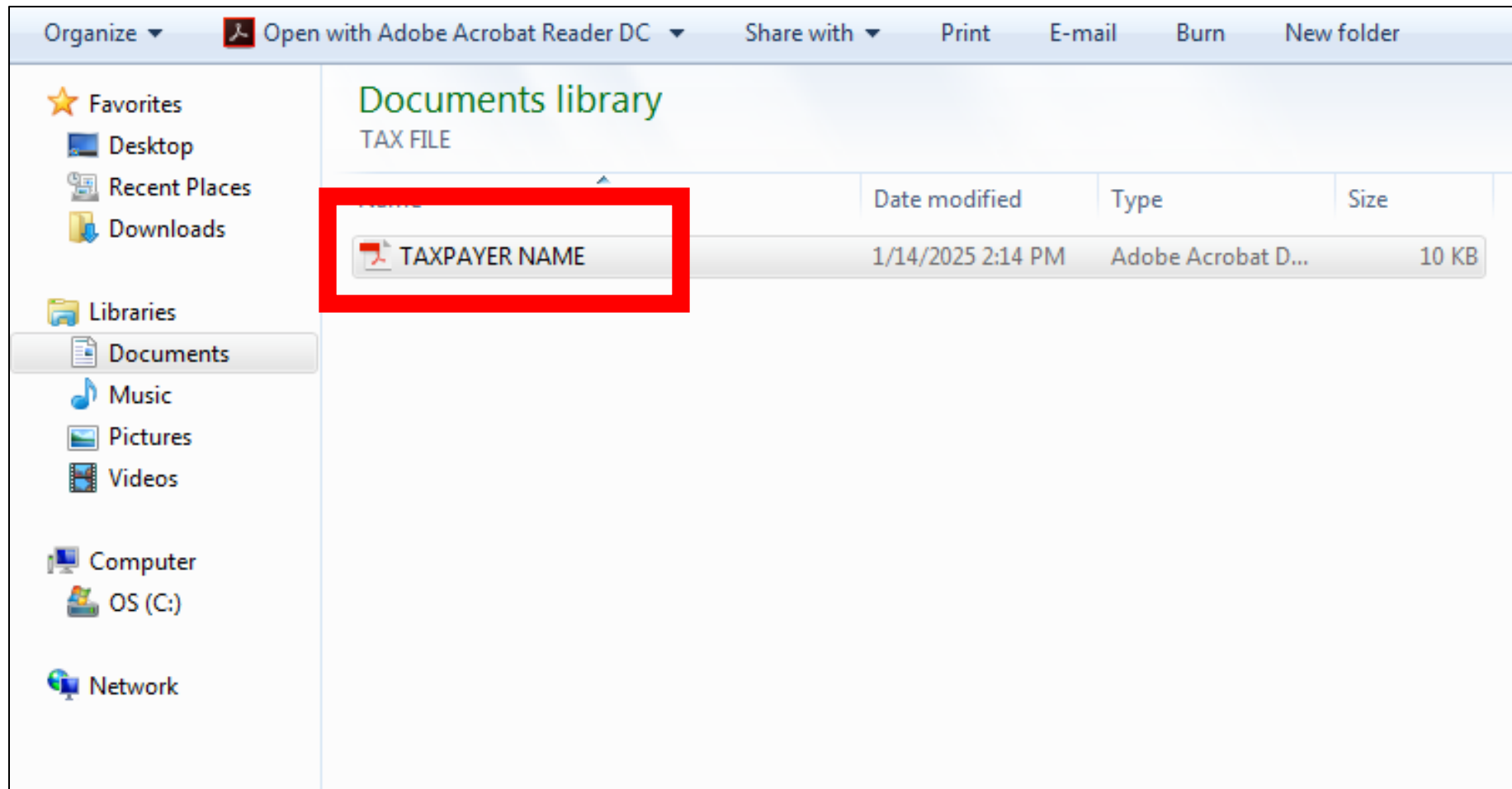
- The file has been saved
- Return to your desktop

**1. Click “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



Drake e-Sign

File Setup

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

- Double click the top “Unsigned” document
- The Signature box will open

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)

original or amended) I am now authorizing, and to the best of my knowledge, the amounts shown in Part I above are the amounts from the income tax return for the year ending December 31, 2024, as provided by the tax preparer, transmitter, or electronic return originator (ERO) and are correct. (b) the reason for rejection of the transmission. (c) the reason for rejection of the transmission.

I authorize the transmission of my tax return to the IRS through the IRS e-file system. I understand that the IRS e-file system is subject to termination, cancellation, or suspension of service without notice. I understand that the IRS e-file system is not available for certain taxpayers and that I may be required to file a paper return. I understand that the IRS e-file system is not available for certain taxpayers and that I may be required to file a paper return.

Signature Capture

Setup



Next Clear Save Close

Your signature ►

Spouse's PIN: check one box only

- Taxpayer will Sign their name
- Click “Next” to go to the next document on the list
- After the taxpayer signs the final document, you will click “Save”
- Signature documents are saved on your computer