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## Case Study

From the Wright Brothers to Apple Inc.'s Jobs and Wozniak, partnerships have combined skill sets to bring incredible solutions and technical advances to fruition. The partnership between SafeSend® and Thomson Reuters® expands on the open and integrated ecosystem of technology being made available to firms – combining award winning automated assembly, delivery, and e-sign with industry leading tax software expertise to bring the best tax experience to firms and their clients. Digital transformation is a top priority for these professionals and this growing partnership provides them with new opportunities for greater automation.

Discover how this partnership has benefited three firms utilizing UltraTax CS® and the SafeSend Suite®.



**Peter Mayolo**  
Owner/President  
Mayolo & Associates LLC

Mayolo & Associates meets the personal and business needs of their clients with outsourced accounting, tax, business foundation, and business management services.

### **In Search of an Easier Way**

A firm with half a dozen people, Mayolo & Associates was looking for an electronic solution for delivering tax returns and other documents to their clients.

“In our old method, people were coming into the office to sign their e-filing forms. We were mailing out the signature forms and having the client mail those back to us. Then we would have to scan those documents,” said Peter Mayolo, president of Mayolo & Associates.

“We were trying to get everybody who could electronically sign a tax return to actually do it. We wanted an easy way to deliver the engagement letter and get clients to sign it before we even start the tax preparation process,” Mayolo said.

“We also wanted an easy way for clients to upload their documents to us.”

### **Nearly Perfect Positive Response**

“Our firm prepares about 800 tax returns, and we decided to use SafeSend to deliver that tax return product out to the clients,” said Mayolo.

Utilizing the SafeSend Suite, they begin the season sending out engagement letters—both on an individual and business level—for review and e-sign. “With the SafeSend products, the success rate of clients accomplishing that are much higher. We’ve had nearly 100% positive response on people signing those engagement letters and getting them back to us,” he said.

### **An Effective Electronic Tax Organizer**

Preparing for tax season is easier now with the use of SafeSend Organizers™, part of the SafeSend Suite. This digital process to send and receive tax organizers and source documents has elevated the experience for both clients and firm staff.

“Before tax season even starts, we are able to send clients a really nice questionnaire that they can electronically fill out, press a button, and it comes right back to us,” Mayolo said. “The number of responses is much higher using the SafeSend product.”

### **More Work in Less Time**

Since implementing the SafeSend Suite, the firm no longer needs to mail out and scan paper documents or require clients to come into the office to sign e-file forms.

“We’ve more or less eliminated that process. Now we don’t have to do much of that work. Now that the clients can easily do it electronically—e-sign all the forms—our time involved in that part of the preparation process is dramatically reduced, which ultimately enables us to do more work, be more efficient, make more money,” said Mayolo.

The fact that clients can also pay their invoices as well as estimated taxes through SafeSend is another advantage Mayolo & Associates appreciates.

Mayolo said he, “Absolutely would recommend SafeSend. The product is easy to use, it looks nice, it’s professional. The client clicks on the email and the screen opens up, there’s no figuring out what they have to do, they’re very easy to click on the buttons to move to the next screen. We’ve had positive feedback, almost 100%, and it’s a product I think would be good for everybody.”





**Robert Jones**  
President & Founder  
RC Jones & Associates Inc.



RC Jones & Associates is a full-service accounting firm providing clients with tax preparation and planning, financial planning, review, advisory services, same-day business start-up packages, and accounting and payroll services.

### **Facing Multiple Challenges**

Delivering information to clients was one of the pain points that the firm was experiencing. President and Founder Robert Jones said, “The challenges that we had prior to SafeSend were on multiple levels. How do we deliver a tax return to a client? Do we have them come in? Do we schedule time? What if both spouses aren’t there on a married filing jointly return? What about corporate returns and the delivery of K-1s?”

Looking for answers to all of their questions led them to implement the SafeSend Suite.

### **A Delivery Tool and Much, Much More**

The firm began using SafeSend Returns®, the core of the SafeSend Suite, as a delivery tool and soon discovered the powerful automation of manual tasks through each season of the tax year.

“Not knowing how we were going to be able to interact with our client base during Covid, I needed to figure out a way to deliver tax returns to my clients in a secure environment that was easy across all levels of technological understanding,” said Jones. “My older clients needed to be able to use it, my younger clients trust it, and my staff love it.”

“SafeSend touched on all of those points. We’re getting signatures, we’re capturing payments, and it’s our handoff to the client. After we implemented SafeSend, we could deliver a tax return in person; we could also deliver it across the country. We even delivered a tax return while somebody was vacationing in Europe. The delivery was exactly the same whether they were in person or halfway across the world.”

Jones appreciated how SafeSend Returns simplified the delivery on complex returns. “We could deliver to a principal contact, and they could forward it from there,” he said.

### **Empowering Staff**

Jones explained that prior to implementing SafeSend, his hands-on approach was both necessary and time-consuming. “When it came to the delivery of a tax return, it felt like I had to be involved. Questions needed to come through me. Printing had to start with me.”

“SafeSend allows the firm to operate much better because it gets rid of the process bottleneck in the firm, which is me,” he said. “Now, after review, we’ve got designated individuals who can print and deliver [via] SafeSend without me being involved and let the people good at their job do what they do best—communicate with our client base.”

### **Simple and Secure**

“SafeSend simplifies the delivery process,” Jones said. “It’s secure. It’s easy to use for all aspects of our client base. From the young to the old it’s easily navigated. It’s not hard to understand.”

He went on to describe other features within the SafeSend Suite that help both his staff and their client base. “There are prompts if there’s a balance due or estimated tax payments. It sends reminders, ‘Hey, you’ve got a tax bill due at the end of September. Do you want us to help you in satisfying that payment, yes or no?’ It does that without me,” Jones said. “That’s one of the things that I love most about it. It takes that process—that automated process—away from us.”

These features and more prompted Jones to conclude with, “I recommend SafeSend.”





**Joe Montgomery**  
Managing Partner  
Montgomery & Company CPAs



Montgomery & Company CPAs go beyond the basic foundation of accounting, preparing taxes, and maintaining compliance. Their financial advisory services help clients identify pitfalls to avoid and opportunities on which to capitalize.

### Tackling the Confusion of Multiple Tools

The firm's Managing Partner, Joe Montgomery, explained the struggle they experienced with delivering tax returns to their clients. "We had multiple software packages that we were dealing with, so a client would have to open two, three, sometimes four different emails, go into sometimes two different pieces of software, in order to just sign their return and get a copy of it."

"We wanted to try to eliminate that and consolidate it into one platform, one simple login, so that the client had everything in front of them in one place and could do everything all at once," Montgomery said, "and SafeSend did that for us."

### Saving Time and Staffing Hours

With a small admin team, the firm needed to scale down processing time. "We had a support team of four and it took them 30 minutes to process one tax return," said Montgomery. "We were looking for ways to shorten that and to reduce the number of staff that we needed in order to deliver all the returns for tax season."

"We looked at a lot of different solutions and SafeSend was the answer. We use SafeSend to communicate with our clients and deliver the returns, get e-signatures signed, get our engagement letters signed, and it's also an opportunity for them to pay the bill."

Reducing the day-to-day workload is not the only advantage the firm has realized. "We were able to cut our support team in half and actually get more work done than we did before," Montgomery said. "We processed over 70 tax returns with SafeSend Returns on the October deadline. There's no way we would have been able to do that without SafeSend."

### Creating a Streamlined Process

In the past, Montgomery & Company tried many different means to deliver tax returns and exchange information with clients. "We used portals at one point," said Montgomery. "We used other delivery systems—sometimes just email—but there wasn't a set process for my support team to use. It was very inconsistent and that was a big pain point for us. That was kind of a nightmare. "I would review the final return.

My support team would then pull those PDFs out of another system, put them on their desktop, create the email or the communication to the client, and pull all these PDFs in," he explained. Multiple steps and processes had a negative impact on the productivity of the firm. "When you're doing that, there's a lot of room for error. We wanted to eliminate all of that. SafeSend did that with one click of a button. It was fantastic!"

### The Benefit of the SafeSend-Thomson Reuters Partnership

When two great things come together to create an unbelievable experience, everyone wins. Montgomery explains the benefit of the integration of SafeSend and Thomson Reuters tax software, "From UltraTax CS to SafeSend has been fantastic. UltraTax CS, in my opinion, is the flagship tax preparation software out there. It's the best out there."

The seamless integration between UltraTax CS and the SafeSend Suite changed the workflow for the firm. "It eliminates all the busywork for my entire team," said Montgomery.

No longer burdened with questions about portal logins or how to sign an 8879, the support team can spend more time helping clients and on more meaningful projects. "SafeSend makes it easy so that they are freed up to do other things," Montgomery said.

### Automation That Still Gives Firms Control

The automation in the SafeSend Suite is powerful yet simple and easy to use. Another plus for firms is the flexibility. Montgomery explained, "It gives me, as the firm owner, control of how I want it to work. Things like when business return states don't allow electronic signatures. I can make the choice whether I allow e-signatures or require manual.

I would absolutely recommend SafeSend Returns, hands down. I give it a 10 out of 10.

See these partnerships in action and learn how your firm can benefit from the combined expertise of Thomson Reuters and SafeSend.



### About the SafeSend Suite

The SafeSend Suite offers powerful functionality to tax and accounting professionals to help them automate all client touchpoints across the tax engagement journey. From initial outreach with engagement letters, questionnaires, and source document gathering to automating the completion of the engagement with tax return delivery and e-signing. The SafeSend Suite allows your firm to automate manual work and provide an intuitive, secure experience for your clients from getting “tax ready” to “finish & file.”

- Engagement Letters – SafeSend Signatures™
- Tax Organizers – SafeSend Organizers™
- Tax Return Assembly & Delivery – SafeSend Returns®
- Secure File Exchange – SafeSend Exchange™
- Extensions – SafeSend Extensions™

At the core of the suite, SafeSend Returns, a multi-year winner of the CPA Practice Advisor Technology Innovation Award, eliminates the manual, labor-intensive tasks many tax departments experience during the assembly and delivery of client-ready tax returns. ●●●●

Visit the [SafeSend Suite](#) page of our website to learn more about automating your tax engagement workflow and **schedule a demo!**

For more information, visit [safesend.com](#).



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### About Thomson Reuters

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