

Lacerte®



eSignature Plus Payments

Get signatures, payment, and peace of mind in one easy step.

eSignature offers you a secure single-step process for getting client signatures, payment, and IRS e-File compliance. Your clients will enjoy the streamlined modern way to review their tax documents, including the 8879 form, sign them, pay your invoice and return the completed package to you from anywhere on any device. It's so easy, clients typically respond within hours. Auto-reminders nudge the slower responders for you, so you get signatures and payments on time.

Signed. Paid. Done.

How it works



Send

One-click request to client

- Tax return
- Schedules
- Attachments
- Form 8879
- Invoice (optional)

Sign and Pay

Review, sign, and pay from anywhere on any device

- Email invitation
- Identity verification
- Document review
- eSignature
- Payment (optional)

Done

Ready to e-File!

- In-product notification of signature and payment
- One-click to e-File

You manage a lot of details at once. Let eSignature help you stay ahead of the game by saving your time and streamlining your processes with a modern convenience that your clients will enjoy.



IRS Compliance

eSignature gives you peace of mind knowing that you have an easily accessible, organized record of the signed return and form 8879.



Modern Client Convenience

Your world centers on taxes, but your clients' worlds don't. That's why they love the ability to easily review, sign and pay from anywhere on any device.



Time Savings

eSignature saves you valuable time by streamlining client document review, signature, and payment into one simple step. Automated reminders mean that you don't need to touch the file again until it is ready to e-File.



Data and Identity Security

Bank-level data security ensures that both your files are transferred safely and that the identity of the tax payer is verified before they can sign the documents.



Prompt Client Payment

With eSignature plus Payments you have the option to send your invoice with the forms and return so that you get paid at the same time they sign. No more forgotten checkbooks or 30 days of waiting.

Get More Information/Buy at
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