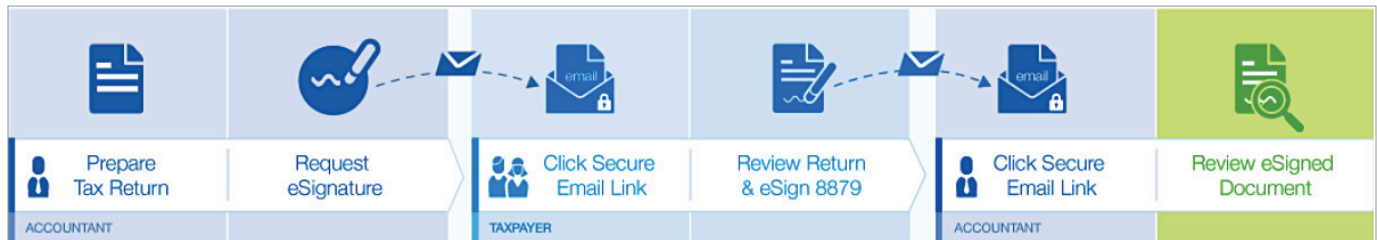


Overview of eSignature for ProConnect Tax Online

With eSignature you can request and receive electronically-signed client documents from inside ProConnect Tax Online. Since there is no need to meet in-person, both you and your client save valuable time.

How eSignature works

1. Prepare a return as usual using ProConnect Tax Online.
2. Send an electronic signature request to your client.
3. Your client receives a request for a signature through a secure email link.
4. Your client reviews and authorizes the return by signing electronically on their device.
5. You receive a secure email link with signed forms.
6. You review the forms to ensure they have been properly signed and finish filing the return.

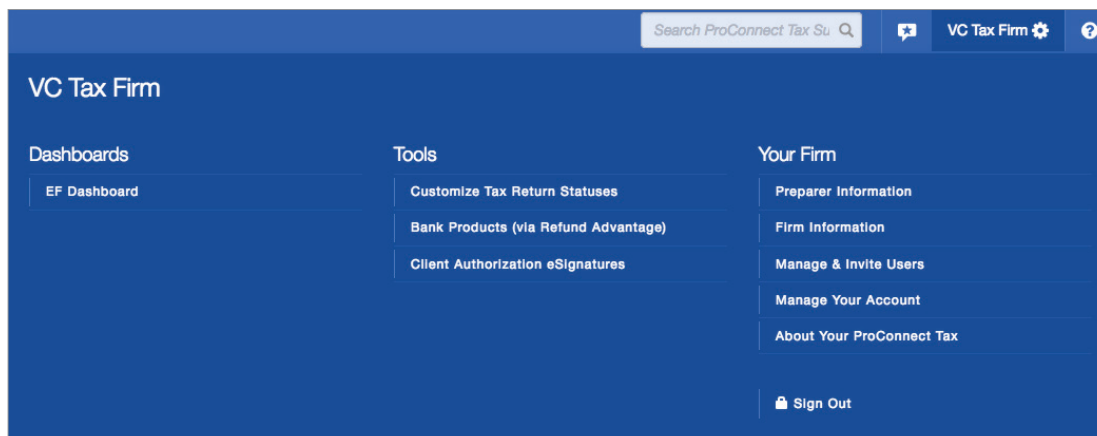


Free eSignatures for you to try

To help you get started, we're offering you five free eSignatures that can be used anytime. You can start as early as today. To receive your free trial:

1. Select the gear symbol (⚙️) at the upper right of the ProConnect Tax Online screen.
2. Under the Tools section, select **Client Authorization eSignatures**.
3. Click the **Try for Free** button at the lower left.

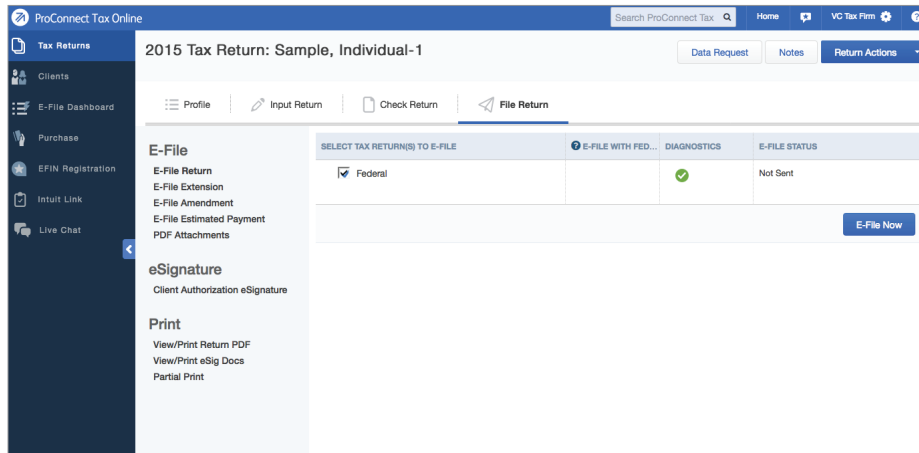
Your account will be automatically credited five free eSignatures, and you will receive a confirmation alert once you sign up.



How to request an eSignature

To request an electronic signature from a client, take the following steps.

1. Select Clients from the left pane in ProConnect Tax Online. From the client list, select the client to receive the request.
2. Click on the **File Return** icon (⚡).
3. Under the eSignature section in the left navigation bar, select **Client Authorization eSignature**.
Note: for your protection, all diagnostics must be cleared to send an eSignature.
4. Click the appropriate client information. You can also create an optional customized email along with the request.
5. To send the request, click the **New eSignature Request** button at the lower right.
6. From the **File Return** icon, you can view the status of the request and an actual PDF of the documents sent to the client.

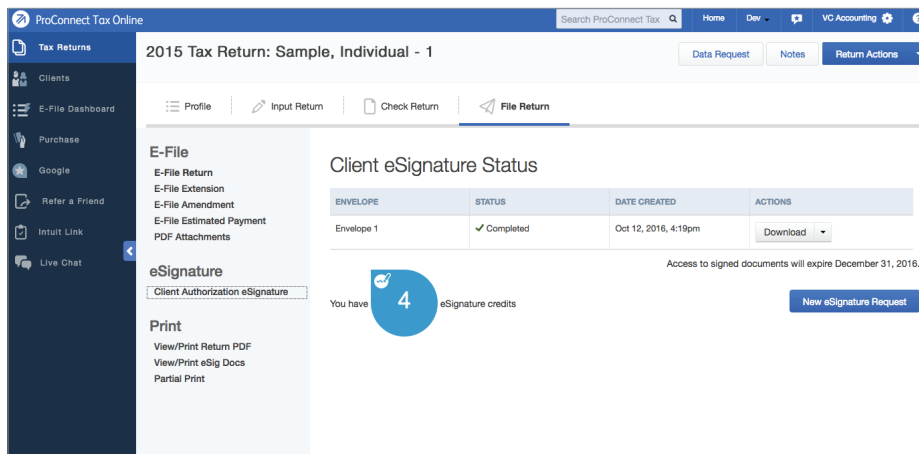


Note: ProConnect Tax Online will keep track and display your eSignature balance. On your first request, you will see your first five credits in your balance. You cannot request an eSignature without a positive balance.

How to purchase additional eSignatures

To purchase additional eSignatures, follow these steps.

1. Select **Purchase** from the left pane in ProConnect Tax Online. Your current eSignature balance will be shown.
2. Click the **Purchase eSig** button.
3. Use the slider to select the desired number of eSignatures you would like to order.
4. Click **Next**.
5. Enter your payment information.
6. Click **Next**. Your order is complete.
7. Click **Finish**, and your new balance is reflected.



For More Information

For more information on eSignature, please visit: proconnect.intuit.com/signature-pto
If you have questions, please contact: esignature@intuit.com