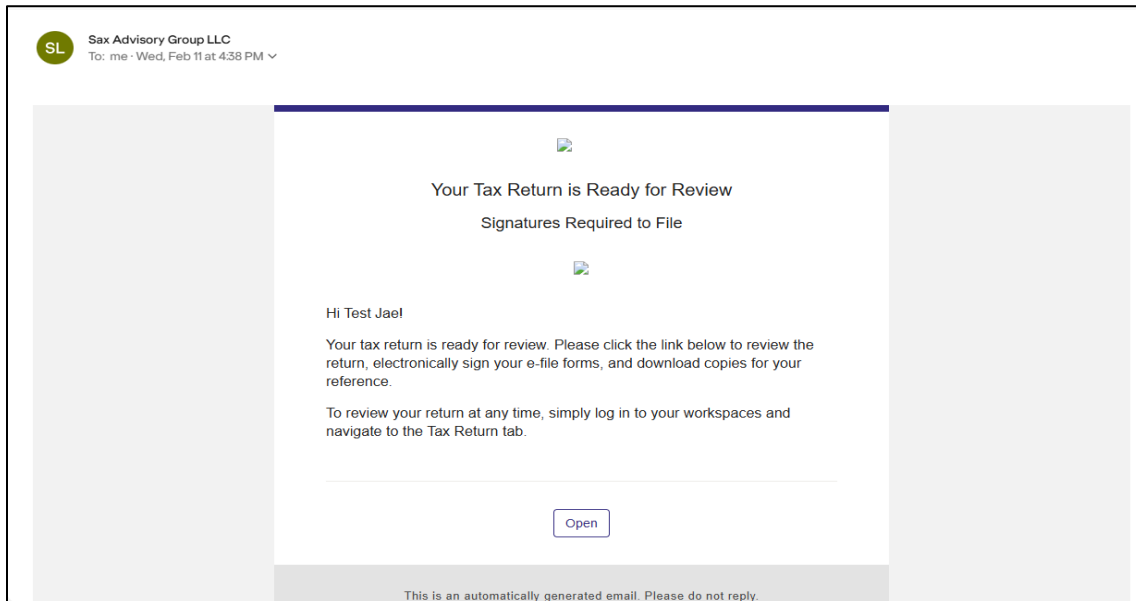
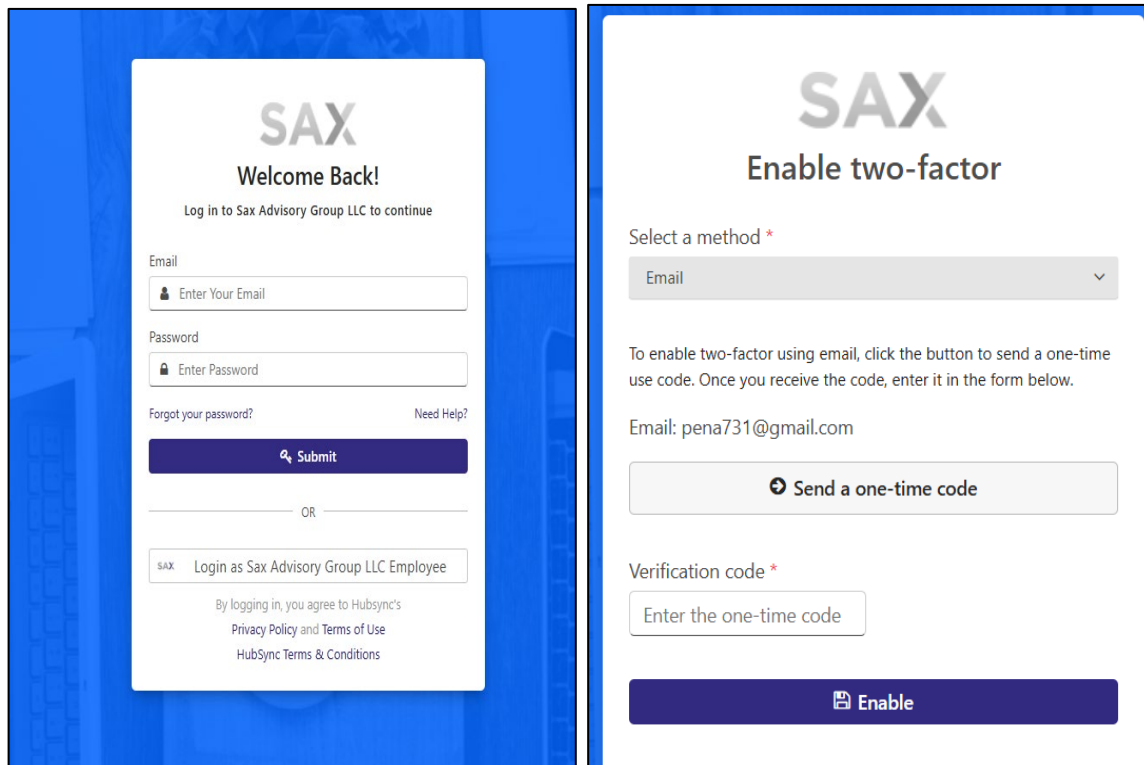


Hubsync Client Experience

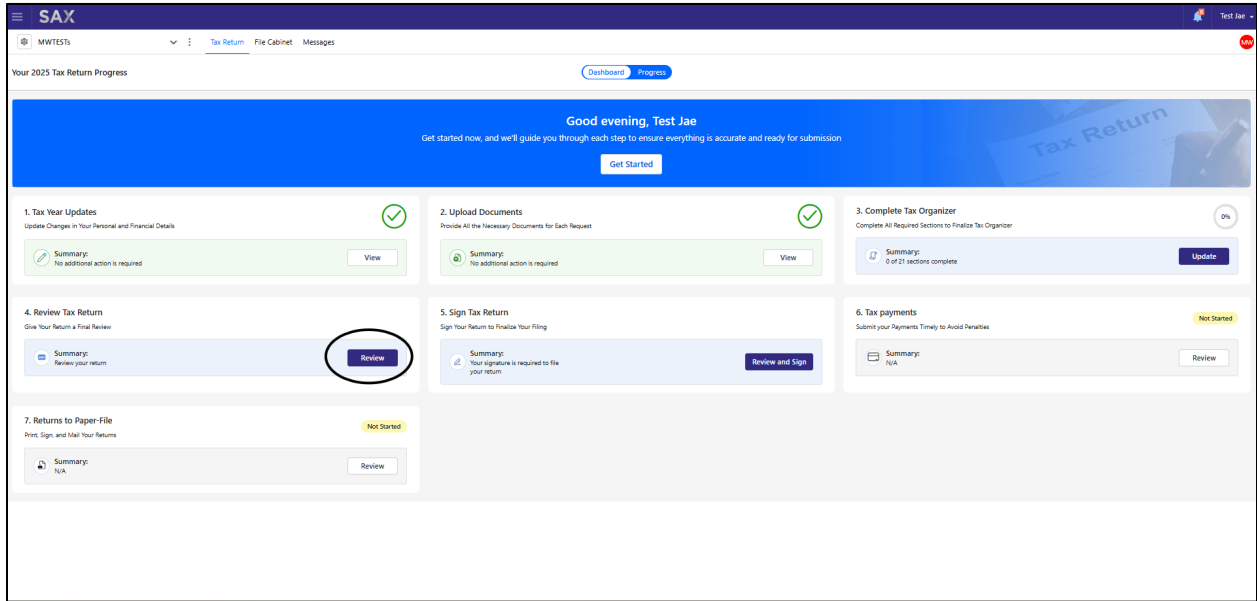
Step 1: Client receives alert email stating their return is ready for review/signature.



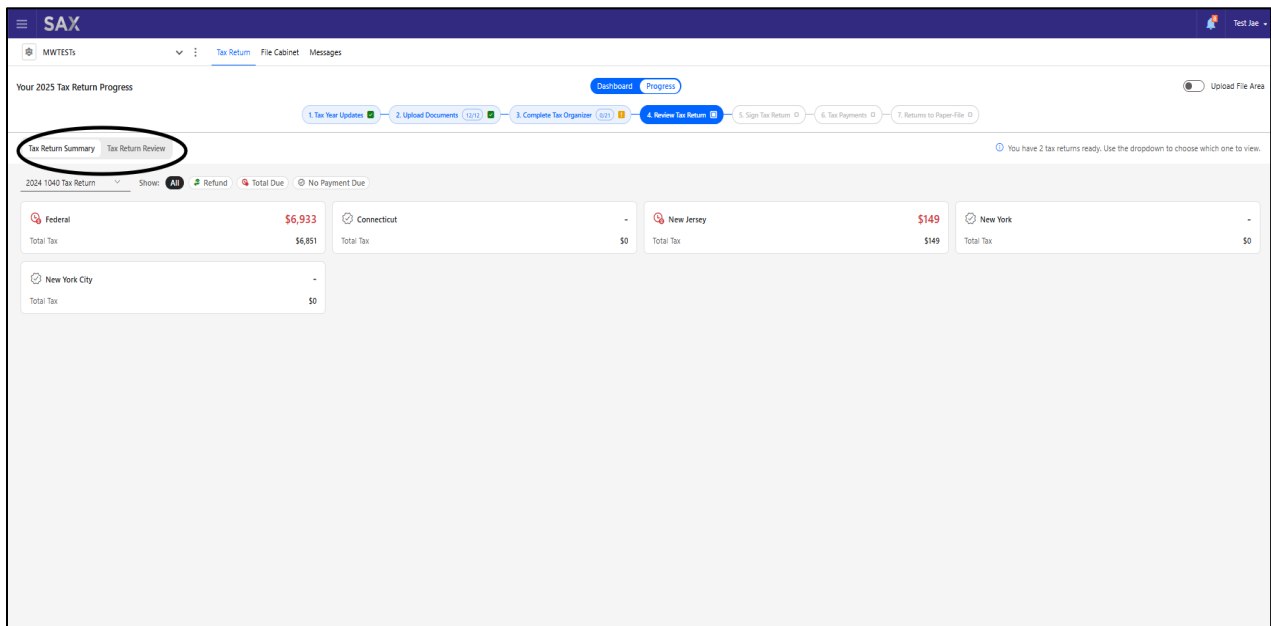
Step 2: Client will click “open” then will be prompted to the HubSync sign in screen to log in to access their return, they will also need to enter a verification code that will be sent via email/sms, best option is SMS (code may come immediate – 1 minute).

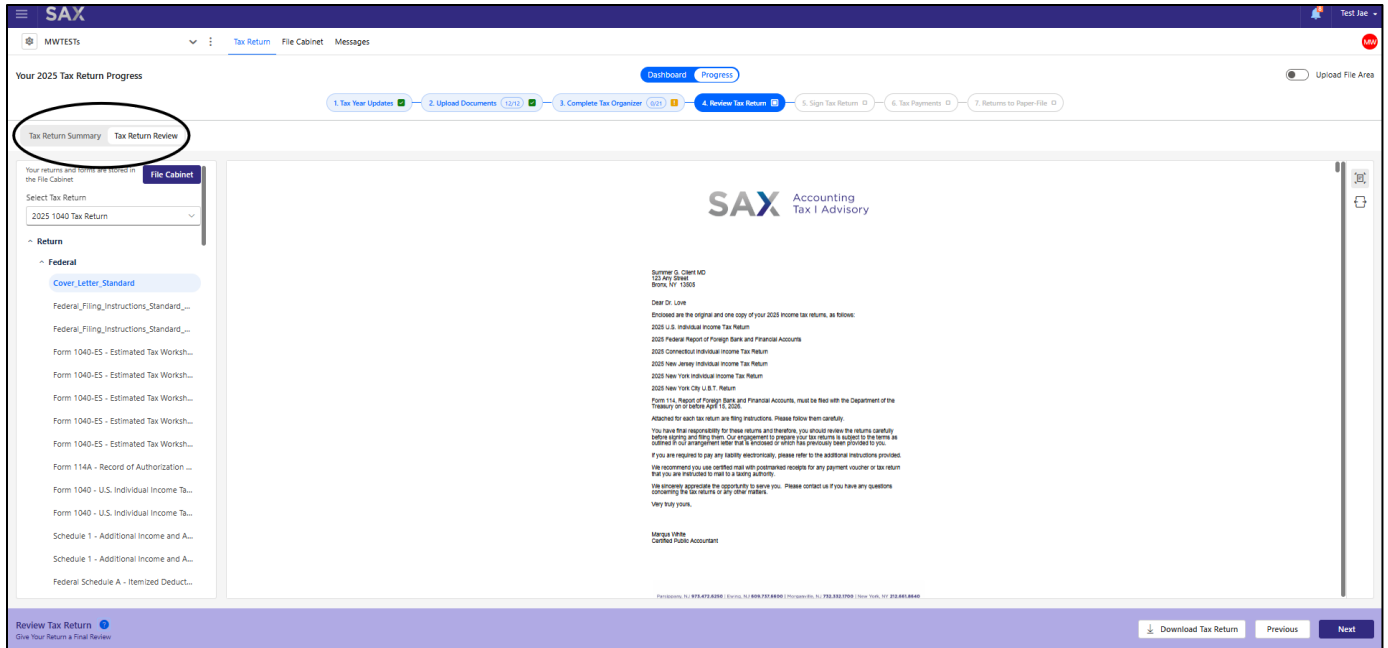


Step 3: After client logs in, the first thing they will see is their dashboard/tax return review with an outstanding list of what they have/have not completed.

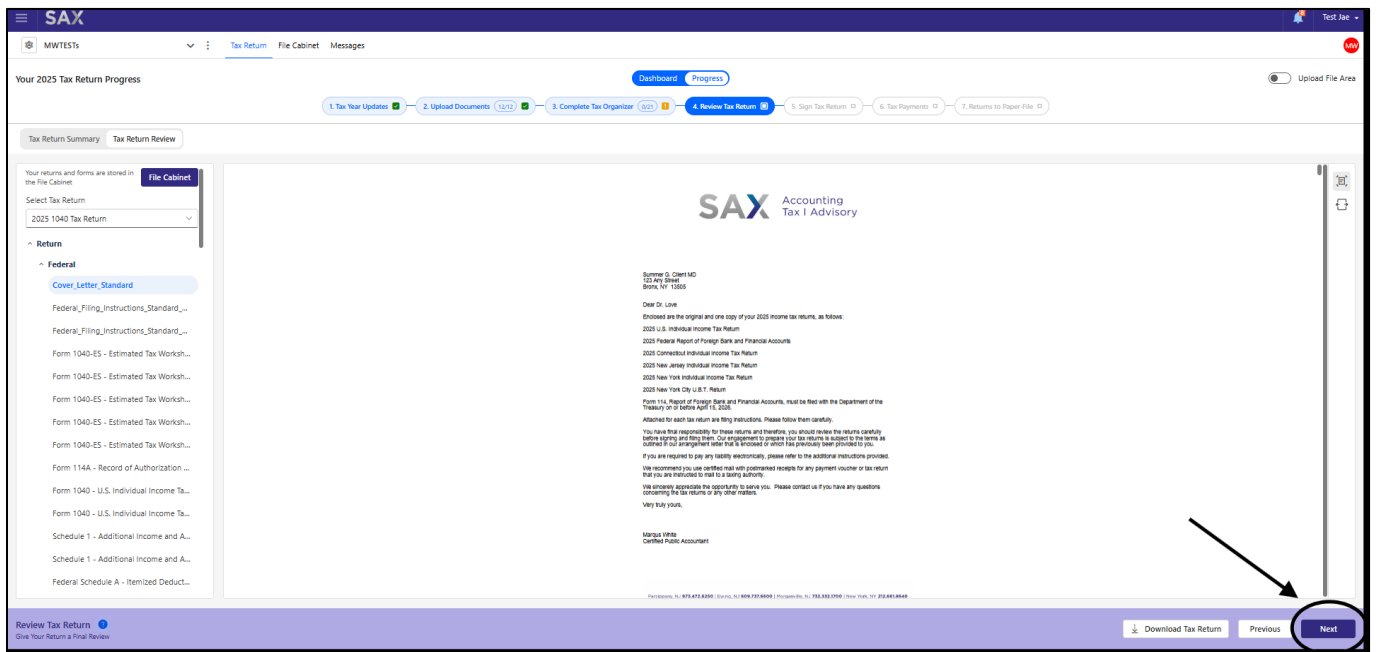


Under the progress tab, they have the option to toggle between “Tax Return Review” and “Tax Return Summary” (as seen below)

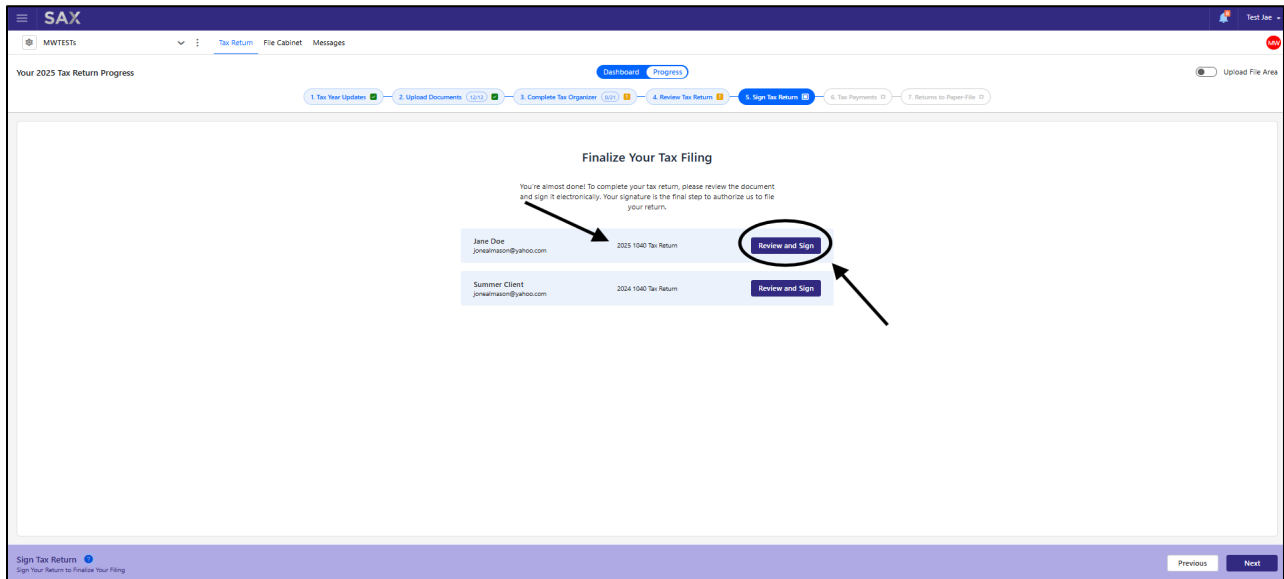




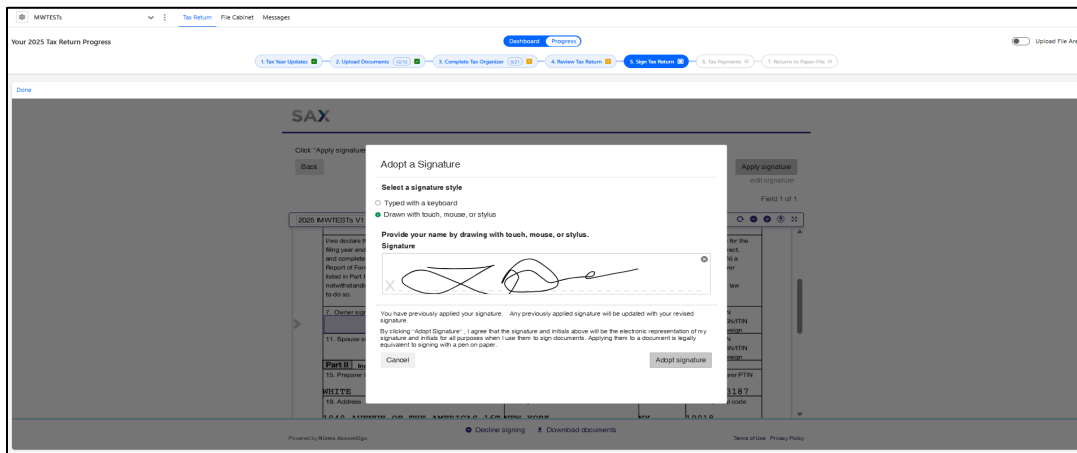
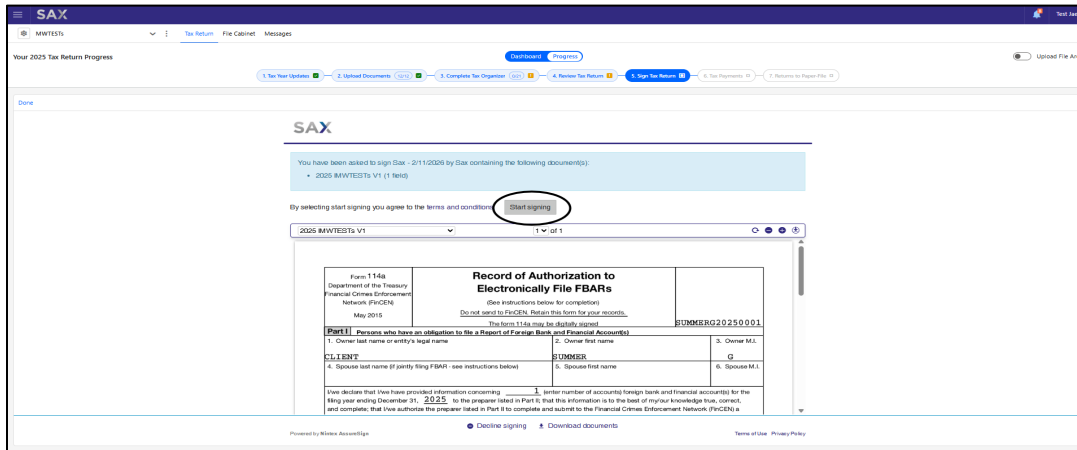
Step 4: The client will then click “next” at the bottom of the screen and will be taken to the next tab to sign their return.



Step 4(a): If there are previous tax year's returns, the client can sign them all at once.



Step 5: The client will then click on "Start Signing" and will be prompted to adopt and apply their signature.



Step 6: Once the signature has been applied, they will then click “submit” and we will receive their authorization. (The date will also be visible once we have the authorization)

SAX

Your 2025 Tax Return Progress

Dashboard Progress

1 Tax Year Updates 2 Upload Documents 3 Complete Tax Organizer 4 Review Tax Return 5 Sign Tax Return 6 Tax Payments 7 Returns to Paper File

Done

SAX

You're almost done.
You have entered all requested information and signatures. When ready, select **Submit** to complete the signing process.

Back **Submit**

2025 MWTESTS V1 1 of 1

I/we declare that I/we have provided information concerning _____ (enter number of accounts) foreign bank and financial account(s) for the filing year ending December 31, **2025**, to the preparer listed in Part II; that this information is to the best of my/our knowledge true, correct, and complete; that I/we authorize the preparer listed in Part II to complete and submit to the Financial Crimes Enforcement Network (FICEN) a Report of Foreign Bank and Financial Accounts (FBAR) based on the information that I/we have provided; and that I/we authorize the preparer listed in Part II to receive information from FICEN, answer inquiries and resolve issues relating to this submission. I/we acknowledge that, notwithstanding this declaration, it is my/our legal responsibility, not that of the preparer listed in Part II, to timely file an FBAR if required by law to do so.

7. Owner signature (Authorized representative if entity)	8. Date MM_DD_YYYY	9. Owner or entity TIN	10. TIN type a. EIN b. <input checked="" type="checkbox"/> SSN/TIN c. Foreign
11. Spouse signature	12. Date MM_DD_YYYY	13. Spouse TIN	14. TIN type a. EIN b. <input type="checkbox"/> SSN/TIN c. Foreign

Part II Individual or Entity Authorized to File FBAR on behalf of Persons who have an obligation to file.

15. Preparer list name WHITE	16. Preparer first name MARQUIS	17. Preparer M.I.	18. Preparer PTIN
19. Address 1040 AVENUE OF THE AMERICAS-16T NEW YORK	20. City NEW YORK	21. State NY	22. ZIP/postal code 10018
23. Country	24. Preparer's (item 15) employer's (Entity) name	25. Employer EIN	26. Preparer's signature

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They also have the option to download and save or print their return.

SAX

Your 2025 Tax Return Progress

Dashboard Progress

1 Tax Year Updates 2 Upload Documents 3 Complete Tax Organizer 4 Review Tax Return 5 Sign Tax Return 6 Tax Payments 7 Returns to Paper File

Done

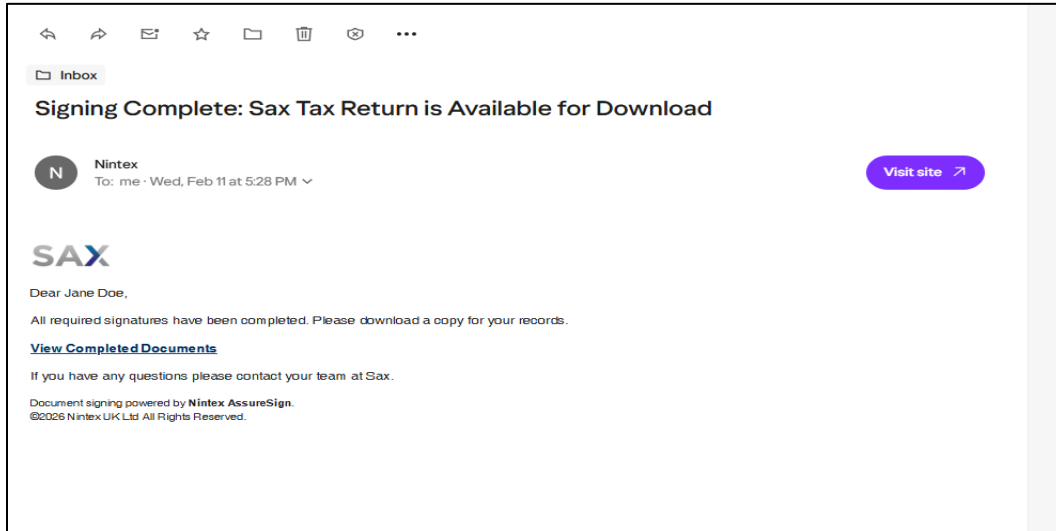
SAX

You have successfully completed the signing process. Your document is complete and may be downloaded by clicking the button below.

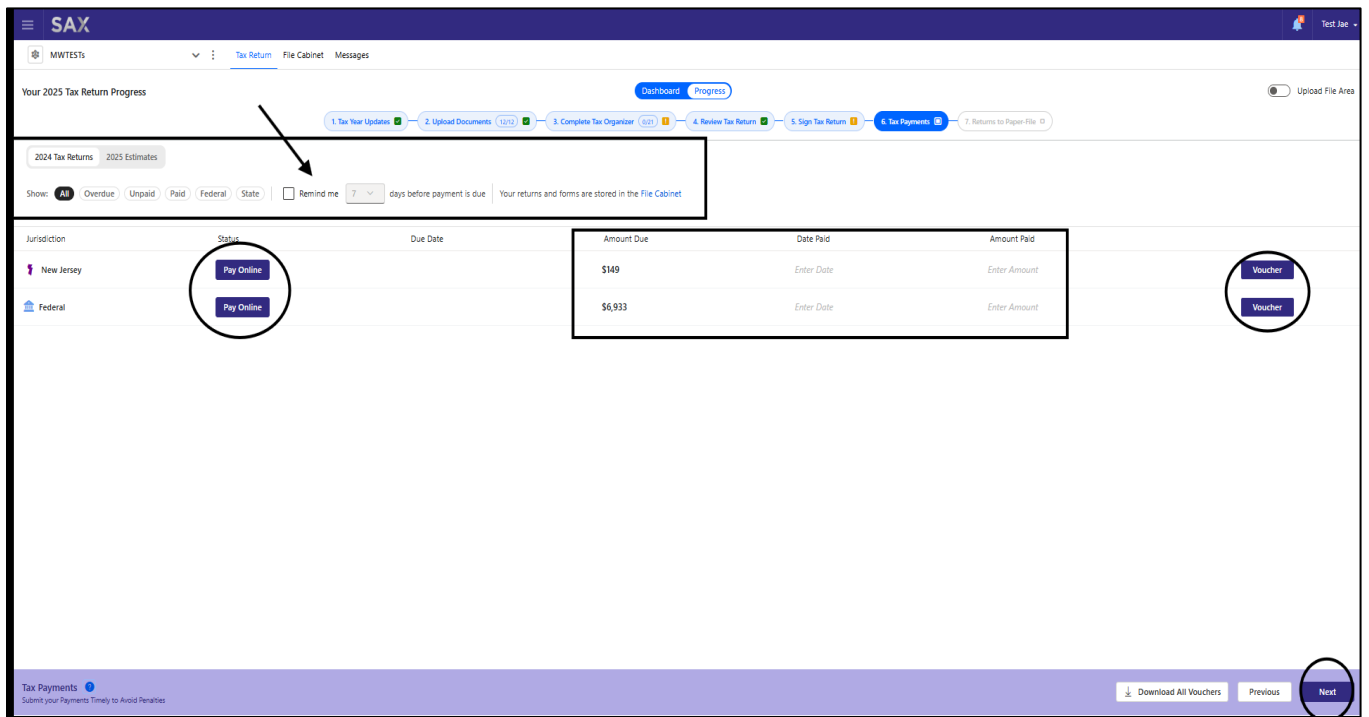
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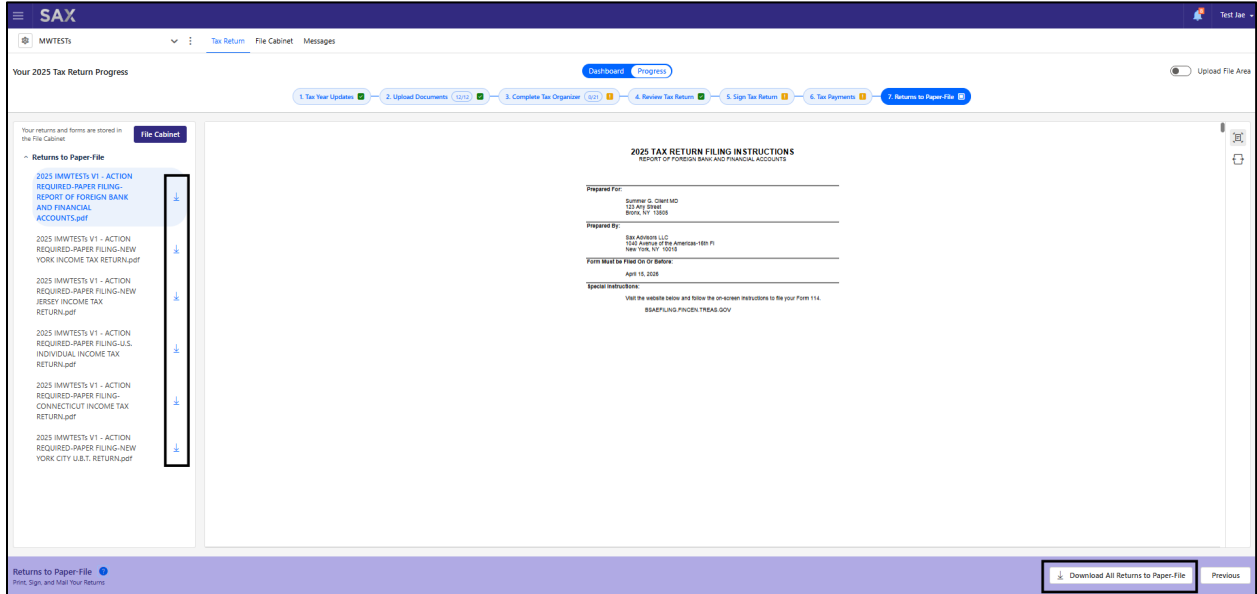
An email will also be sent to them stating their tax return is ready for download (as shown below).



Step 7: After they have submitted their signature, the next screen will be their tax payments/estimates. They can set payment reminders, pay online or download their vouchers and enter dates and amounts paid.



Step 8: If they have paper filed returns, they will have to download to print, sign, date and mail the respective returns.



Step 9: The signing process is now complete. The client will also have access to their tax return in their file cabinet under “from CPA Firm” > “Tax package” folder. There will be a breakdown of each section of the return.

