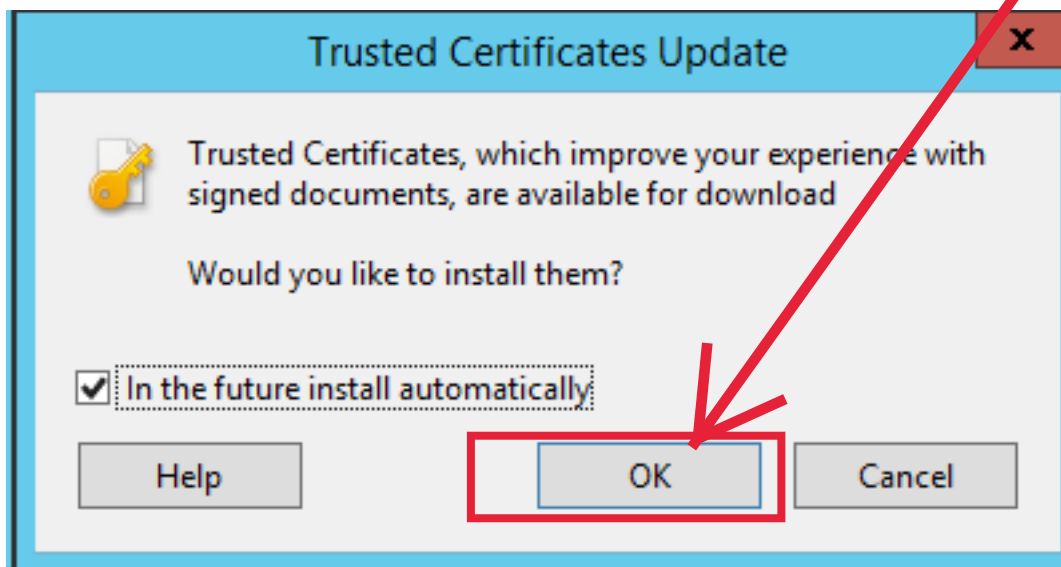


Once you download your engagement letter and open it in Adobe Reader.  
You may receive this message when opening your document in Adobe. Please click "OK".



**Please read your letter/Document carefully. Once you have read the letter/document and are ready to sign please see the next pages for what the signature boxes look like and how to sign them digitally.**



Comments or additional requests: TX Franchise Due May 15, 2017. Do we need to file?

CA income tax due April 15, 2017. Do we need to file?

Accepted by:

\_\_\_\_\_  
Taxpayer (parent, if return is for a child under 18)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse (**required** for joint returns)

\_\_\_\_\_  
Date

**Please make your choices on questions listed if applicable. If you have any other requests or comments please add those in the space provided. Some examples may be: I/we need to file in a particular state; I/we started a business that we need to file for; I/we need you to file for our child; I/we need to file for foreign financial assets, etc.**

**Please date your signatures in the space provided (a calendar may drop down). I will walk through the steps for signing on the next page. If you are signing for a business or Trust please include your title on the space provided.**

**Seale Financial Services, Inc**

Proactive Tax Planning, Compliance, and Consulting

Comments or additional requests: TX Franchise Due May 15, 2017. Do we need to file? CA income tax due April 15, 2017. Do we need to file? 

We are no longer required to file in CA. We need to file foreign financial assets.

Accepted by:  
Taxpayer (parent, if return is for a child under 18)  
1/16/17  
Spouse (required for joint returns)  
  
Date

January 2017						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
Today: 1/15/2017						

- Export PDF
- Create PDF
- Edit PDF
- Comment
- Combine Files
- Organize Pages
- Fill & Sign
- Send for Signature
- Send & Track
- More Tools

This was to illustrate the calendar that may appear in the date field. Drop down list has been answered and comments/requests have been added.

**Seale Financial Services, Inc**

Proactive Tax Planning, Compliance, and Consulting

Comments or additional requests: TX Franchise Due May 15, 2017. Do we need to file? CA income tax due April 15, 2017. Do we need to file? 

We are no longer required to file in CA. We need to file foreign financial assets.

Accepted by:  
Tax  
  
Date

Unsigned signature field (Click to sign)

  
Spouse (required for joint returns)  
  
Date

- Export PDF
- Create PDF
- Edit PDF
- Comment
- Combine Files
- Organize Pages
- Fill & Sign
- Send for Signature
- Send & Track
- More Tools

I am hovering my mouse on the signature field. The next page will show what happens when I click on that box.

If you do not already have a saved signature or digital id please see the next pages.  
If you have a saved signature or digital id please skip to page 14.

## Digital ID Configuration Required



You should see this box if you have no id's /signatures configured  
This signature field requires a digital signature identity.

Would you like to configure one now?

**Click on the "configure" button**

Help

Configure Digital ID

Cancel

## Configure a Digital ID for signing



A Digital ID is required to create a digital signature. The most secure Digital ID are issued by trusted Certificate authorities and are based on secure devices like smart card or token. Some are based on files.

You can also create a new Digital ID, but they provide a low level of identity assurance.

### Select the type of Digital ID:



#### Use a Signature Creation Device

Configure a smart card or token connected to your computer



#### Use a Digital ID from a file

Import an existing Digital ID that you have obtained as a file



#### Create a new Digital ID

Create your self-signed Digital ID

**Chose Create a new Digital Id then click continue**



Cancel

Continue

## Select the destination of the new Digital ID



**Chose Save to File and then click continue**

Digital IDs are typically issued by trusted providers that assure the validity of the identity.

Self-signed Digital ID may not provide the same level of assurance and may not be accepted in some use cases.

Consult with your recipients if this is an acceptable form of authentication.



### Save to File

Save the Digital ID to a file in your computer



### Save to Windows Certificate Store

Save the Digital ID to Windows Certificate Store to be shared with other applications



Back

Continue

## Create a self-signed Digital ID



**Add your information where applicable below and then click continue**

Enter the identity information to be used for creating the self-signed Digital ID.

Digital IDs that are self-signed by individuals do not provide the assurance that the identity information is valid. For this reason they may not be accepted in some use cases.

Name

John Doe

Organizational Unit

*Enter Organizational Unit...*

Organization Name

*Enter Organization Name...*

Email Address

johndoe@gmail.com

Country/Region

US - UNITED STATES



Key Algorithm

2048-bit RSA



Use Digital ID for

Digital Signatures



Back

Continue



## Save the self-signed Digital ID to a file



**Choose a password that you can remember and click save**

Add a password to protect the private key of the Digital ID. You will need this password again to use the Digital ID for signing.

Save the Digital ID file in a known location so that you can copy or backup it.

Your Digital ID will be saved at the following location :

C:\Users\jaime\AppData\Roaming\Adobe\Acrobat\DC\S

Browse

**Apply a password to protect the Digital ID:**

.....

**Confirm the password:**

.....

**if you have multiple signers you will have to do this twice.**



Back

Save

## Sign with a Digital ID



Once you click save you will see the available digital ids.

Choose the Digital ID that you want to use for signing:

Refresh



**John Doe** (Digital ID file)

Issued by: John Doe, Expires: 2022.01.15

[View Details](#)



**Jaime Seale** (Windows Digital ID)

Issued by: Jaime Seale, Expires: 2021.09.27

[View Details](#)

If you do not need another digital id please skip to page 14.

Click on Configure New Digital ID to create an additional signature file.



Configure New Digital ID

Cancel

Continue

## Configure a Digital ID for signing



A Digital ID is required to create a digital signature. The most secure Digital ID are issued by trusted Certificate authorities and are based on secure devices like smart card or token. Some are based on files.

You can also create a new Digital ID, but they provide a low level of identity assurance.

### Select the type of Digital ID:



#### Use a Signature Creation Device

Configure a smart card or token connected to your computer



#### Use a Digital ID from a file

Import an existing Digital ID that you have obtained as a file

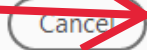


#### Create a new Digital ID

Create your self-signed Digital ID



**Chose Create a new Digital Id then click continue**



Continue

## Select the destination of the new Digital ID



**Chose Save to File and then click continue**

Digital IDs are typically issued by trusted providers that assure the validity of the identity.

Self-signed Digital ID may not provide the same level of assurance and may not be accepted in some use cases.

Consult with your recipients if this is an acceptable form of authentication.



### Save to File

Save the Digital ID to a file in your computer



### Save to Windows Certificate Store

Save the Digital ID to Windows Certificate Store to be shared with other applications



Back

Continue

## Create a self-signed Digital ID



**Add your information where applicable below and then click continue**

Enter the identity information to be used for creating the self-signed Digital ID.

Digital IDs that are self-signed by individuals do not provide the assurance that the identity information is valid. For this reason they may not be accepted in some use cases.

Name Jane Doe

Organizational Unit *Enter Organizational Unit...*

Organization Name *Enter Organization Name...*

Email Address janedoe@gmail.com

Country/Region US - UNITED STATES ▼

Key Algorithm 2048-bit RSA ▼

Use Digital ID for Digital Signatures ▼



Back

Continue

## Save the self-signed Digital ID to a file



**Choose a password that you can remember and click save**

Add a password to protect the private key of the Digital ID. You will need this password again to use the Digital ID for signing.

Save the Digital ID file in a known location so that you can copy or backup it.

Your Digital ID will be saved at the following location :

C:\Users\jaime\AppData\Roaming\Adobe\Acrobat\DC\S

Browse

**Apply a password to protect the Digital ID:**

.....

**Confirm the password:**

.....



Back

Save

## Sign with a Digital ID



Choose the Digital ID that you want to use for signing:

Refresh



**Jane Doe** (Digital ID file)

Issued by: Jane Doe, Expires: 2022.01.15

[View Details](#)



**Jaime Seale** (Windows Digital ID)

Issued by: Jaime Seale, Expires: 2021.09.27

[View Details](#)



**John Doe** (Digital ID file)

Issued by: John Doe, Expires: 2022.01.15

[View Details](#)

Now you have all your digital ids created, chose the correct one for signature box one and click on continue



Configure New Digital ID

Cancel

Continue

Appearance

Standard Text



Create

John  
Doe

Digitally signed  
by John Doe  
Date: 2017.01.15  
14:13:15 -06'00'

☐ Lock document after signing

[View Certificate Details](#)

Review document content that may affect signing

Review

**enter your password here to enable signing**

Enter the Digital ID PIN or Password...

Back

Sign



Sign as "John Doe"



Appearance

Standard Text



Create

John  
Doe

Digitally signed  
by John Doe  
Date: 2017.01.15  
14:13:15 -06'00'

☐ Lock document after signing

[View Certificate Details](#)

Review document content that may affect signing

Review

.....|

click on the sign button

Back

Sign

## Save As

⏮ ⏪ ⏩ ⏭ ⏮ This PC ▶ DATA (E:) ▶ DRAKEDDM ▶ CLIENTS ▶ ⏭ 🔍 Search CLIENTS

Organize ▾

New folder

The document will need to be saved before the second signature can be applied

⋮ ▾ ?

C on I\_AM\_GRO  
D on I\_AM\_GRO  
Desktop  
Documents  
Downloads  
E on I\_AM\_GRO  
G on I\_AM\_GRO  
Music  
Pictures  
Videos  
X on I\_AM\_GRO  
OS (C:)  
DATA (E:)  
My Passport 2T

Name

Date modified

Type

Size

A	7/11/2016 6:19 PM	File folder
B	12/26/2016 9:56 AM	File folder
C	1/13/2017 10:56 AM	File folder
D	4/17/2016 3:24 PM	File folder
E	1/3/2017 10:40 PM	File folder
F	10/6/2016 2:01 PM	File folder
G	1/10/2017 4:55 PM	File folder
H	9/13/2016 7:07 PM	File folder
I	3/6/2014 5:25 PM	File folder
J	11/9/2016 10:40 AM	File folder
K	8/24/2016 8:37 PM	File folder
L	8/24/2016 9:06 PM	File folder
M	12/31/2016 11:38 ...	File folder
N	12/14/2016 4:13 PM	File folder

You can give the file a new name if you would like. I left mine unchanged.

File name:

Sample 2016 1040 engage ltr

Save as type:

Adobe PDF Files (\*.pdf)

⏮ Hide Folders

If you change your file name click save and go to page 20

Save

Cancel

## Confirm Save As



Sample 2016 1040 engage ltr.pdf already exists.  
Do you want to replace it?

**click yes**

Yes

No



Comments or additional requests: TX Franchise Due May 15, 2017. Do we need to file?

No

CA income tax due April 15, 2017. Do we need to file?

No

We are no longer required to file in CA. We need to file foreign financial assets.

Accepted by:

John Doe

Digitally signed by John Doe  
Date: 2017.01.15 14:15:41 -06'00'

Taxpayer (parent, if return is for a child under 18)

1/16/17

Date

Spouse (required for joint returns)

1/16/17

Date

**Your digital signature should appear as this one above. If your document only requires one signature you are finished. Please save a copy of the signed document back to your portal account.**

**Now you are ready to add the additional signature  
Click on the "Spouse" signature box**

## Sign with a Digital ID



Choose the Digital ID that you want to use for signing:

Refresh



**John Doe** (Digital ID file)

Issued by: John Doe, Expires: 2022.01.15

[View Details](#)



**Jaime Seale** (Windows Digital ID)

Issued by: Jaime Seale, Expires: 2021.09.27

[View Details](#)



**Jane Doe** (Digital ID file)

Issued by: Jane Doe, Expires: 2022.01.15

[View Details](#)

**Choose the correct digital id and click continue**



Configure New Digital ID

Cancel

Continue

Appearance

Standard Text



Create

Jane  
Doe

Digitally signed  
by Jane Doe  
Date: 2017.01.15  
14:19:07 -06'00'

☐ Lock document after signing

[View Certificate Details](#)

Review document content that may affect signing

Review

**add your password to activate the sign button**

Enter the Digital ID PIN or Password...

Back

Sign

Appearance

Standard Text



Create

Jane  
Doe

Digitally signed  
by Jane Doe

Date: 2017.01.15  
14:19:07 -06'00'

☐ Lock document after signing

[View Certificate Details](#)

Review document content that may affect signing

Review

\*\*\*\*\*

click on sign

Back

Sign

## Save As

Navigation icons: Back, Forward, Up, Down, Home, Recent, Search, Refresh. Address bar: This PC > DATA (E:) > DRAKEDDM > CLIENTS > Search CLIENTS

Organize ▾ New folder

**Save your fully signed document. Once you have done this you can upload it to your portal account**

Left sidebar (Navigation pane):  
C on I\_AM\_GRO  
D on I\_AM\_GRO  
Desktop  
Documents  
Downloads  
E on I\_AM\_GRO  
G on I\_AM\_GRO  
Music  
Pictures  
Videos  
X on I\_AM\_GRO  
OS (C:)  
DATA (E:)  
My Passport 2T

Name	Date modified	Type	Size
A	7/11/2016 6:19 PM	File folder	
B	12/26/2016 9:56 AM	File folder	
C	1/13/2017 10:56 AM	File folder	
D	4/17/2016 3:24 PM	File folder	
E	1/3/2017 10:40 PM	File folder	
F	10/6/2016 2:01 PM	File folder	
G	1/10/2017 4:55 PM	File folder	
H	9/13/2016 7:07 PM	File folder	
I	3/6/2014 5:25 PM	File folder	
J	11/9/2016 10:40 AM	File folder	
K	8/24/2016 8:37 PM	File folder	
L	8/24/2016 9:06 PM	File folder	
M	12/31/2016 11:38 ...	File folder	
N	12/14/2016 4:13 PM	File folder	

**You can give the file a new name if you would like. I left mine unchanged.**

File name: Sample 2016 1040 engage ltr

Save as type: Adobe PDF Files (\*.pdf)

Hide Folders

**If you change your file name just click save and go to page 26**

Save

Cancel



## Confirm Save As



Sample 2016 1040 engage ltr.pdf already exists.  
Do you want to replace it?

**Click Yes**

Yes

No



Comments or additional requests: TX Franchise Due May 15, 2017. Do we need to file?

No

CA income tax due April 15, 2017. Do we need to file?

No

We are no longer required to file in CA. We need to file foreign financial assets.

Accepted by:

John Doe

Digitally signed by John Doe  
Date: 2017.01.15 14:15:41 -06'00'

Taxpayer (parent, if return is for a child under 18)

1/16/17

Date

Jane Doe

Digitally signed by Jane Doe  
Date: 2017.01.15 14:21:50 -06'00'

Spouse (required for joint returns)

1/16/17

Date

**Your fully executed and digitally signed document should look like this or your signature can appear as on the next page.**

