

FORM 8879 ELECTRONIC SIGNATURE INSTRUCTIONS

ELECTRONIC SIGNATURE INSTRUCTIONS

WATCH A SHORT 2 MINUTE INSTUCTIONAL VIDEO OR FOLOW THE INSTRUCTIONS BELOW:

- VIDEO: <https://proconnect.wistia.com/medias/agm646b2du>
- WRITTEN INSTUCTIONS ARE BELOW
- See **Page 7** to learn how to **“Save” a copy of your 2020 Tax Return**, signed 8879 and Invoice after signing via DocuSign.
 - Note: A copy of your 2020 Tax Return, signed 8879 and Invoice will be available on the Client Document Portal within 3 business days of signing.

Invoice Payment Methods

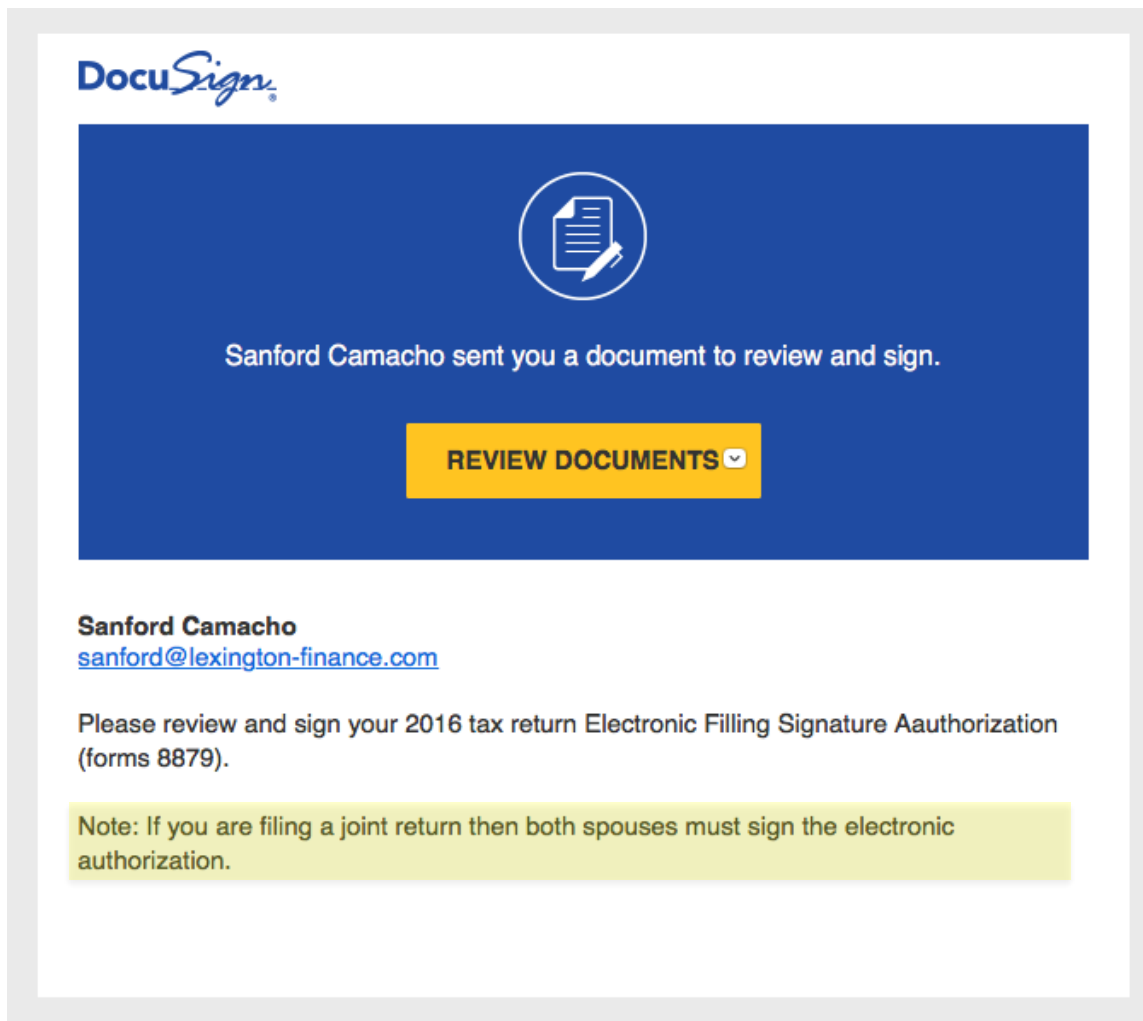
1. *New this year - Pay by debit/credit card when you electronically sign your 8879 via DocuSign.
2. Pay by debit/credit card by:
 - i. Fill-out the **“[Credit Card Billing Information](#)”** From
 - Press the Ctrl key & Right Click the Link above with your Mouse.
 - ii. Calling Lexington Financial
3. Pay by Check:
 - Please Mail all checks to our Texas office, 503 Woodland Park, Georgetown, TX 78633

1. ALL 8879 ELECTRONIC SIGNATURES ARE SIGNED VIA DOCUSIGN

FORM 8879 ELECTRONIC SIGNATURE INSTRUCTIONS

2. YOU WILL RECEIVE AN EMAIL FROM LEXINGTON FINANCIAL/DOCUSIGN.

- **Note:** for Joint Returns both Spouses must sign the electronic authorization (8879) Form.
- **1 Email** address on file. 2 emails, requesting E-Signatures for each Spouse, will be sent to the 1 email address on file.
- **2 email** addresses on file (one for each Spouse). An email, requesting E-Signature, will be sent to each Spouses personal email address on file.
- **Both Spouses need to E-sign for the fully executed 8879 to be sent back to Lexington Financial.**




2. CLICK ON "REVIEW DOCUMENTS". YOU WILL BE REDIRECTED TO A NEW PAGE.

FORM 8879 ELECTRONIC SIGNATURE INSTRUCTIONS

4. YOU WILL BE PROMPTED TO ENTER YOU PERSONAL IDENTIFYING INFORMATION.

Security Requests from Sender

 **Sanford Camacho**
Lexington Financial

ID Check - Personal Information


Enter your home address. This information, along with your name will be used to generate a list of questions to verify your identity.

Required Information (Home Address)	Optional Information
Name: <input type="text"/>	Last 4 digits of SSN: <input type="text"/>
Street 1: <input type="text"/>	Date of Birth: <input type="text"/> / <input type="text"/> / <input type="text"/>
Street 2: <input type="text"/>	mm / dd / yyyy
City: <input type="text"/>	
State: <input type="text"/>	
Zip: <input type="text"/> - <input type="text"/>	

You must enter required and valid information before you can continue.

4. FILL OUT THE FORM AND PRESS "NEXT". YOU WILL BE REDIRECTED TO NEW PAGE WHERE YOU WILL NEED TO ANSWER THREE SECURITY QUESTIONS THAT ARE GENERATED AT RANDOM FROM PUBLIC INFORMATION (I.E. DMV RECORDS).

Security Requests from Sender

 **Sanford Camacho**
Lexington Financial

ID Check - Identification Questions

These questions are being generated as a means of an identity check requested by the document sender. None of this information is provided to the document sender or to anyone except you.

Please answer all of the questions provided.

FORM 8879 ELECTRONIC SIGNATURE INSTRUCTIONS

6. ANSWER THE THREE QUESTIONS AND THEN CLICK “*SUBMIT ANSWERS*”. YOU WILL BE REDIRECTED TO A NEW SCREEN

1. If you are unable to answer the security questions correctly you will be locked out. If this happens please call Lexington Financial and we will resend the E-signature.

7. CLICK THE BOX ON THE TOP LEFT INDICATING THAT YOU “*AGREE TO USE ELECTRONIC RECORDS AND SIGNATURES*”. THEN PRESS “*CONTINUE*”.

Please Review & Act on These Documents

Sanford Camacho
Lexington Financial

Please review and sign your 2016 tax return Electronic Filing Signature Authorization (forms 8879).

[View More](#)

Please read the [Electronic Records and Signature Disclosure](#).

I agree to use electronic records and signatures.

[CONTINUE](#) [OTHER ACTIONS](#)

DocuSign Envelope ID: 4D6DEAEC-0414-471C-9DB0-45401E14312C

Form 8879 <small>Department of the Treasury Internal Revenue Service</small>	IRS e-file Signature Authorization ▶ Don't send to the IRS. This isn't a tax return. ▶ Keep this form for your records. ▶ Information about Form 8879 and its instructions is at www.irs.gov/form8879 .	OMB No. 1545-0074 2016
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Submission Identification Number (SID) ▶

8. THE SCREEN WILL BECOME UN GRAYED AND THE “*START*” BUTTON ON THE LEFT OF YOUR 8879 WILL APPEAR. PRESS THE “*START*” BUTTON.

[START](#)

DocuSign Envelope ID: 4D6DEAEC-0414-471C-9DB0-45401E14312C

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Submission Identification Number (SID) ▶

Taxpayer's name | Social security number

FORM 8879 ELECTRONIC SIGNATURE INSTRUCTIONS

9. A POP-UP SCREEN WILL APPEAR TO “ADOPT YOUR SIGNATURE”. YOU CAN DO ONE OF THE THREE OPTIONS:

1. SELECT STYLE
2. DRAW
3. “UPLOAD” A SIGNATURE YOU HAVE SAVED

10. ONCE YOU CHOOSE YOUR OPTION PRESS “ADOPT AND SIGN”

Adopt Your Signature [X]

Confirm your name, initials, and signature.

Full Name **Initials**

[Select Style](#) [Draw](#) [Upload](#)

PREVIEW [Change Style](#)

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN **CANCEL**

FORM 8879 ELECTRONIC SIGNATURE INSTRUCTIONS

11. YOU WILL BE RETURNED TO THE 8879 FORM. YOU WILL NEED TO CLICK ON THE "SIGN" BUTTON TO APPLY YOUR SIGNATURE".

DocuSign Envelope ID: 4D6DEAEC-0414-471C-9DB0-45401E14312C

Form 8879 <small>Department of the Treasury Internal Revenue Service</small>	IRS e-file Signature Authorization ▶ Don't send to the IRS. This isn't a tax return. ▶ Keep this form for your records. ▶ Information about Form 8879 and its instructions is at www.irs.gov/form8879 .	OMB No. 1545-0074 <div style="font-size: large; font-weight: bold;">2016</div>
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Submission Identification Number (SID) ▶

Taxpayer's name	Social security number
Spouse's name	Spouse's social security number

Part I Tax Return Information – Tax Year Ending December 31, 2016 (Whole dollars only)

1 Adjusted gross income (Form 1040, line 38; Form 1040A, line 22; Form 1040EZ, line 4; Form 1040NR, line 37)	1	
2 Total tax (Form 1040, line 63; Form 1040A, line 39; Form 1040EZ, line 12; Form 1040NR, line 61)	2	
3 Federal income tax withheld from Forms W-2 and 1099 (Form 1040, line 64; Form 1040A, line 40; Form 1040EZ, line 7; Form 1040NR, line 62a)	3	
4 Refund (Form 1040, line 76a; Form 1040A, line 48a; Form 1040EZ, line 13a; Form 1040-SS, Part I, line 13a; Form 1040NR, line 73a)	4	
5 Amount you owe (Form 1040, line 78; Form 1040A, line 50; Form 1040EZ, line 14; Form 1040NR, line 75) ..	5	

Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)

Under penalties of perjury, I declare that I have examined a copy of my electronic individual income tax return and accompanying schedules and statements for the tax year ending December 31, 2016, and to the best of my knowledge and belief, it is true, correct, and accurately lists all amounts and sources of income I received during the tax year. I further declare that the amounts in Part I above are the amounts from my electronic income tax return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for my electronic income tax return and, if applicable, my Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

I authorize Lexington Financial ERO firm name to enter or generate my PIN 83301 Enter five digits, but don't enter all zeros as my signature on my tax year 2016 electronically filed income tax return.

I will enter my PIN as my signature on my tax year 2016 electronically filed income tax return. Check this box **only** if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Your signature ▶ Date ▶ 2/9/2017

Spouse's PIN: check one box only

I authorize Lexington Financial ERO firm name to enter or generate my PIN 83301 Enter five digits, but don't enter all zeros as my signature on my tax year 2016 electronically filed income tax return.

I will enter my PIN as my signature on my tax year 2016 electronically filed income tax return. Check this box **only** if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Spouse's signature ▶ _____ Date ▶ _____

Practitioner PIN Method Returns Only – continue below

Part III Certification and Authentication – Practitioner PIN Method Only

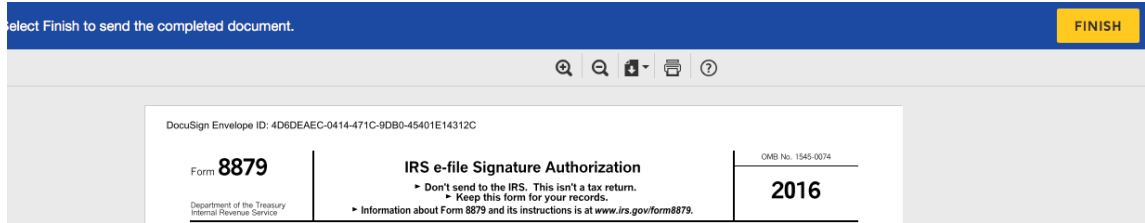
ERO's EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN. Don't enter all zeros

I certify that the above numeric entry is my PIN, which is my signature for the tax year 2016 electronically filed income tax return for the taxpayer(s) indicated above. I confirm that I am submitting this return in accordance with the requirements of the Practitioner PIN method and **Pub. 1345**, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns.

NEXT

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12. ONCE YOU HAVE APPLIED YOUR SIGNATURE YOU WILL NEED TO CLICK “FINISH” IN THE TOP RIGHT HAND CORNER OF YOUR SCREEN.

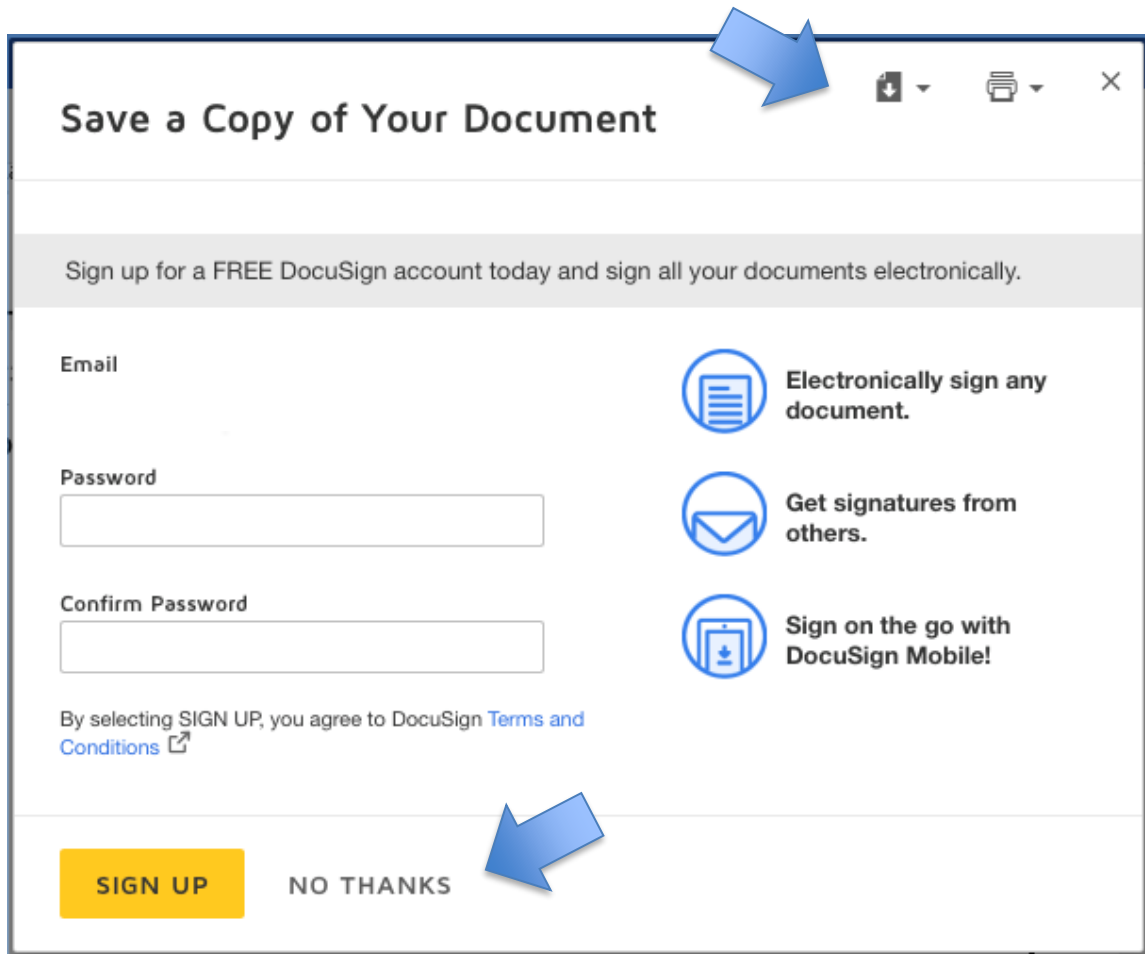


elect Finish to send the completed document. **FINISH**

DocuSign Envelope ID: 4D6DEAEC-0414-471C-9DB0-45401E14312C

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13. YOU WILL BE RE-DIRECTED TO A NEW SCREEN WHERE YOU CAN SAVE OR PRINT YOUR SIGNED TAX RETURN. CLICK ON THE BUTTONS IN THE TOP RIGHT FOR OPTIONS. WHEN YOU SELECT AN OPTION IT WILL APPEAR IN A NEW WINDOW.



Save a Copy of Your Document

Sign up for a FREE DocuSign account today and sign all your documents electronically.

Email

Password

Confirm Password

By selecting SIGN UP, you agree to DocuSign [Terms and Conditions](#)

SIGN UP NO THANKS

- Electronically sign any document.
- Get signatures from others.
- Sign on the go with DocuSign Mobile!

14. RETURN TO THE “DOCUSIGN” WEB PAGE TAB AND PRESS “NO THANKS” (THERE IS NO NEED TO SIGN UP FOR THE “FREE DOCUSIGN” SERVICE. PRESS “NO THANKS” AFTER PRINTING OR SAVING YOUR TAX DOCUMENT.)

FORM 8879 ELECTRONIC SIGNATURE INSTRUCTIONS

15. YOU HAVE NOW COMPLETED YOUR E-SIGNATURE.



You have successfully signed your document using DocuSign



Now that you have seen how easy it is to sign a document with DocuSign, try it for yourself. Join more than 100 million DocuSigners who sign and send documents in minutes. Get your 30-day FREE Trial today!

[FREE TRIAL](#)

REFER DOCUSIGN

[GET \\$20](#)

Get a \$20 Amazon.com Gift Card for every friend that buys an annual plan

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KEEP BUSINESS DIGITAL™



For individuals, small and medium business or enterprise, we have a product to match.

Trusted by millions of users worldwide



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