

## Security/PII/E-Signatures Information

- I recommend all clients (taxpayer and spouse) set up access to the following applications:
  - **IRS Secure Access** – The Secure Access account with the IRS will allow you to view your account records with IRS – amounts owed (detailed by year), payment history, copies of most notices sent – access your Transcripts (Wage & Income, Account, and Record Transcripts), confirm Estimated Payments, check your Economic Impact Payment (EIP) amounts received, and apply for an Identity Protection PIN (IP PIN). <https://www.irs.gov/payments/view-your-tax-account>
  - **IRS2GO** – This is an App that is downloaded to your mobile devices (after you have set up Secure Access). It is a quick way to check your Refund Status, Make Payments, and receive a Security Code for 2-factor authentication when accessing IRS online tools. <https://www.irs.gov/newsroom/irs2goapp>
  - Apply for an **IP PIN** – Once limited to victims of Identity Theft, this program is now available to everyone. Enrollment in this program prevents anyone else from filing a tax return using your SSN and eliminates the Identity Verification step that many individual tax returns have been subjected to for the last few years. The Identity Verification step can delay refunds by 6 – 12 weeks. After setting up Secure Access and IRS2GO, you can apply online for your IP PIN and immediately receive your IP PIN. The ONLY person with whom you will share that IP PIN is ME (my office). It is ONLY used to efile your tax return, so NO ONE ELSE should be given your IP PIN. <https://www.irs.gov/identity-theft-fraud-scams/get-an-identity-protection-pin> The IRS is encouraging everyone to participate in this program to reduce tax theft through fraudulently filed returns and they eventually want everyone who will be e-filing to participate in this program. **NOTE:** If you are already in the IP PIN program, you do not need to apply again.
  - **MyFTB** – If you have a filing requirement with the state of CA, you can set up your MyFTB account. This is similar to IRS Secure Access but with even MORE features. With MyFTB, you can also see actual copies of your prior year tax returns, submit Power of Attorney forms (POAs), protest a Proposed Assessment, have a secure chat with a representative, securely submit messages with documentation attached, and set up email notification for all correspondence notices. <https://www.ftb.ca.gov/myftb/create-an-account.html>
- E-Signatures for e-filing filing tax returns – since June last year, we started offering E-Signature capability for clients to sign their tax returns. We will be offering it again this year. The IRS modified some of their requirements regarding the use of E-Signatures and we will send you updated information on the changes and how to use this feature.
- E-Signatures for Power of Attorney (POA) forms – Later this year, the IRS will allow clients to use E-Signatures to sign POA forms. We will keep you posted on that progress, as needed.
- Identity Verification – The IRS and the states are placing more stringent requirements on tax preparers with respect to proving Identity Verification of clients and their dependents. The best way for us to document our due diligence is to get a copy of SS cards for all dependents and a copy of a valid (not expired) driver's license for taxpayer and spouse. Maggie and Jen will be working with you on getting this updated information.