

E-signing Tax Returns Via Qount Portal

1 Navigate to <https://rickhoff.qount.io/home-dashboard>

2 You will see your e-signature request in this box.

The screenshot displays the Qount Portal home dashboard. On the left is a dark blue sidebar with navigation items: # Home, # Clarify, # Dashboards, # Documents, # Engagement Letters, # ESignatures (with a red circle containing the number 2), # Questionnaires, # Status, # To Do's (with a red circle containing the number 1), Messages (with a minus icon), and #RICKHOFF, ALLISON. The main content area features two white boxes at the top with the text "No Data Found" and "We'll notify you when something new arrives". Below these is a tabbed interface with three tabs: "E-sign (2)" (highlighted with a pink circle), "Clarify", and "Questionnaires". The "E-sign (2)" tab is active, showing a list of e-signature requests with the following details:

Client	RICKHOFF, ALLISON
Signer	ALLISON RICKHOFF
Type	CUSTOM
Sent To	05/30/2024

3 Click in the box to start the signing process.

Documents
Management Letters
Signatures
Questionnaires
tus
Do's
Messages
RICKHOFF, ALLISON

E-sign (2) Clarify Questionnaires

Client	RICKHOFF, ALLISON
Signer	ALLISON RICKHOFF
Type	CUSTOM
Sent To	05/30/2024

4 Fill in your personal information in order to verify your identity.

docuSign

Security Requests from Sender

Rickhoff & Associates
RICKHOFF & ASSOCIATES

ID Check - Personal Information

Enter your home address. This information, along with your name will be used to generate your ID.

Required Information (Home Address)

Name: ALLISON RICKHOFF

Street 1:

Street 2:

5

Fill out the KBA questions to verify your identity. Please note: this is generated by a Knowledge Based Authentication which we do not have access to or can see your answers.

Security Requests from Sender



Rickhoff & Associates
RICKHOFF & ASSOCIATES

ID Check - Identification Questions

These questions are being generated as a means of an identity check requested by the document sender.

Which of the following people have you known?

-
-
-

Which of the following age ranges most closely matches the age of 'I'?

- 1
- 3
- 3

Which of the following vehicles have you recently owned or leased?

- 2
- 2
- 2

6

Agree to use the electronic records and signatures.



< > RICKHOFF, ALLISON



Please Review & Act on These Documents



Rickhoff & Associates
RICKHOFF & ASSOCIATES



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

I agree to use electronic records and signatures.

ALLISON RICKHOFF

Spouse's name

Part I Tax Return Information — Tax Year Ending December

Enter whole dollars only on lines 1 through 5.

Note: Form 1040-SS filers use line 4 only. Leave lines 1, 2, 3, and 5 blank.

1 Adjusted gross income

7 Click "CONTINUE"

RICKHOFF, ALLISON

Esign

Please Review & Act on These Documents

Rickhoff & Associates
RICKHOFF & ASSOCIATES

Please read the [Electronic Record and Signature Disclosure](#).
 I agree to use electronic records and signatures.

CONTINUE OTHER ACTIONS ▾

ALLISON RICKHOFF
Source name

Part I Tax Return Information — Tax Year Ending December 31, 2023 (Enter year you are authorizing.)
Enter whole dollars only on lines 1 through 5.
Note: Form 1040-SS files use line 4 only. Leave lines 1, 2, 3, and 5 blank.


1	Adjusted gross income	
2	Total tax	
3	Federal income tax withheld from Forms W-2 and Forms 1099	
4	Amount you want refunded to you	
5	Amount you owe	

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 the income tax return (original or amended) I am now authorizing, and to the best of my knowledge and belief it is true, correct, and complete. I further declare that the amounts in Part I above are the amounts from the income tax return (original or amended) I am now authorizing. 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 the income tax return (original or amended) I am now authorizing and, if applicable, my Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

I authorize _____ (ERO firm name) to enter or generate my PIN _____ as my signature on the income tax return (original or amended) I am now authorizing. Enter five digits, but don't enter all zeros.

I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. 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 **02/18/24**

Spouse's PIN: check one box only

I authorize _____ (ERO firm name) to enter or generate my PIN _____ as my signature on the income tax return (original or amended) I am now authorizing. Enter five digits, but don't enter all zeros.

I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. 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.


8 Click on the sign box to start signing.

my knowledge and belief, it is true, correct, and complete. I further declare that the amounts in Part I above are return (original or amended) I am now authorizing. I consent to allow my intermediate service provider, transmit to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejec for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indica payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests r business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the pr taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payer personal identification number (PIN) below is my signature for the income tax return (original or amended) I am Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

I authorize _____ (ERO firm name) to enter or gener signature _____ (original or amended) I am now authorizing.

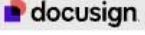
I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this box only if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO m below.

Your signature  _____ Date _____

Spouse's PIN: check one box only

I authorize _____ (ERO firm name) to enter or gener signature on the income tax return (original or amended) I am now authorizing.

I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO m below.



9

Click "ADOPT AND SIGN" once you have your signature.

PREVIEW

ALISON RICKHOFF AR

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic signature when I (or my agent) use them on documents, including legally binding contracts.

ADOPT AND SIGN CANCEL

authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent at 1-888-353-4537 . Payment of my tax liability must be made by the U.S. Treasury Financial Agent at least 15 business days prior to the payment (settlement) date. I also authorize the financial institution to receive confidential information necessary to answer inquiries and resolve issues related to my tax liability. My personal identification number (PIN) below is my signature for the income tax return (original or amended) and my consent to the Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

I authorize _____ ERO firm name _____ signature on the income tax return (original or amended) I am now authorizing.

I will enter my PIN as my signature on the income tax return (original or amended) if you are using your own PIN and your return is filed using the Practitioner PIN below.

10

Click "Sign" on all documents that require it. The document will automatically scroll to the next signature box.

10 Date the payment is to be electronically withdrawn: _____

11 Electronic funds withdrawal amount: _____ | 00

12 Name on account: _____

Step 4: Taxpayer declaration and signature (Sign only after completing Step 3)

I consent that my refund may be directly deposited as designated in Step 3 and declare the information correct. If I have filed a joint return, this is an irrevocable appointment of the other spouse as authorized agent.

I authorize the Illinois Department of Revenue (IDOR) and its designated financial agent to initiate direct deposit of my refund, or an electronic funds withdrawal (direct debit) of my tax liability to the financial institutions involved in the processing of an electronic overpayment of taxes to receive necessary to answer inquiries and resolve issues related to the payment.

I do not want direct deposit of my refund, or an electronic funds withdrawal (direct debit) of my tax liability.

Under penalties of perjury, I declare the information on my electronic Form IL-1040 or IL-1040-X and the return of **Required - Sign Here** is true, correct, and complete. To the best of my knowledge, my return is true, correct, and complete. I authorize IDOR to inform my ERO if my return or accompanying information may be sent to IDOR by my ERO. I authorize IDOR to inform my ERO if my return or accompanying information has been rejected. If rejected, I authorize IDOR to identify the reason(s) so the return may be resubmitted.

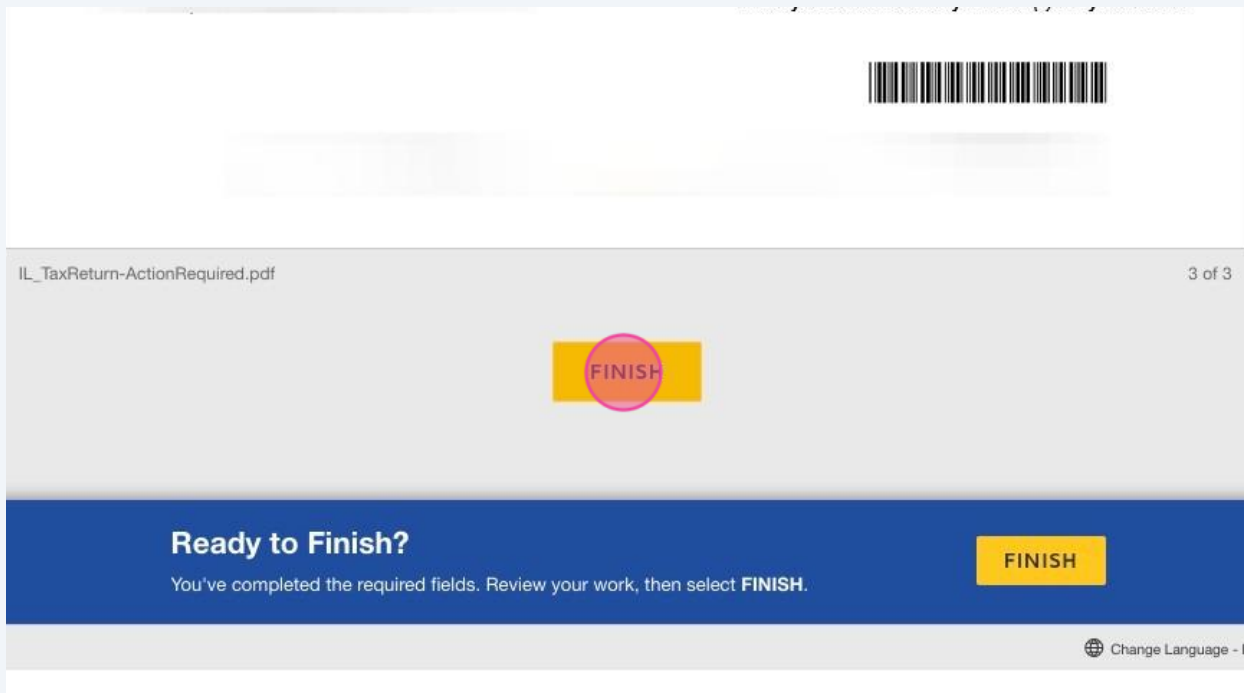
Sign here ↓ _____ 02/18/24 _____
Your signature Date Spouse's signature (if joint)

Step 5: Electronic return originator (ERO) and paid preparer declaration and signature

I declare that I have examined this taxpayer's electronic Form IL-1040 or IL-1040-X, the information on the return and accompanying information are true, correct, and complete.

ERO's signature _____ Date 02/18/24 _____
Firm's name or your name if self-employed RICKHOFF & ASSOCIATES, LTD. _____
Mailing address 1107 Frontage Rd. _____
O'Fallon IL 62269 _____
City State ZIP _____

11 Click "FINISH" when you are done.



12 Click "cloud_download" if you would like to download the documents you just signed. You can also go back to the documents section and see them again.

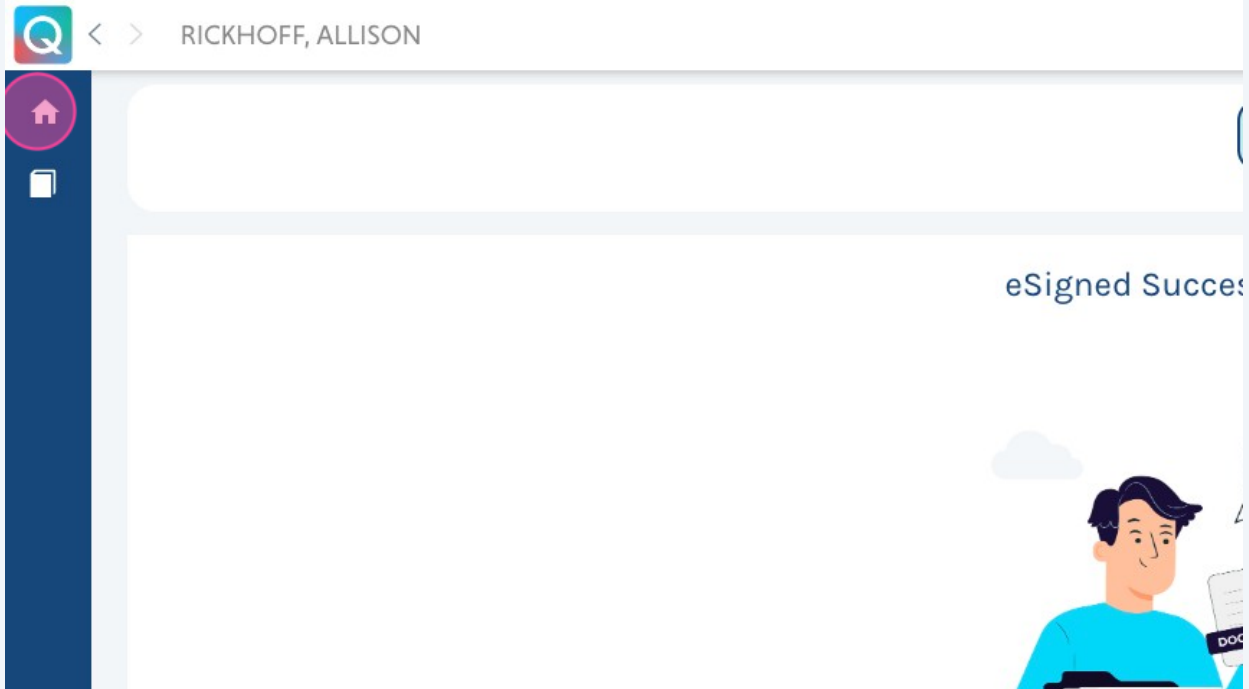
Thank you for signing the eSign document

Click [here](#) to visit our portal for more information.

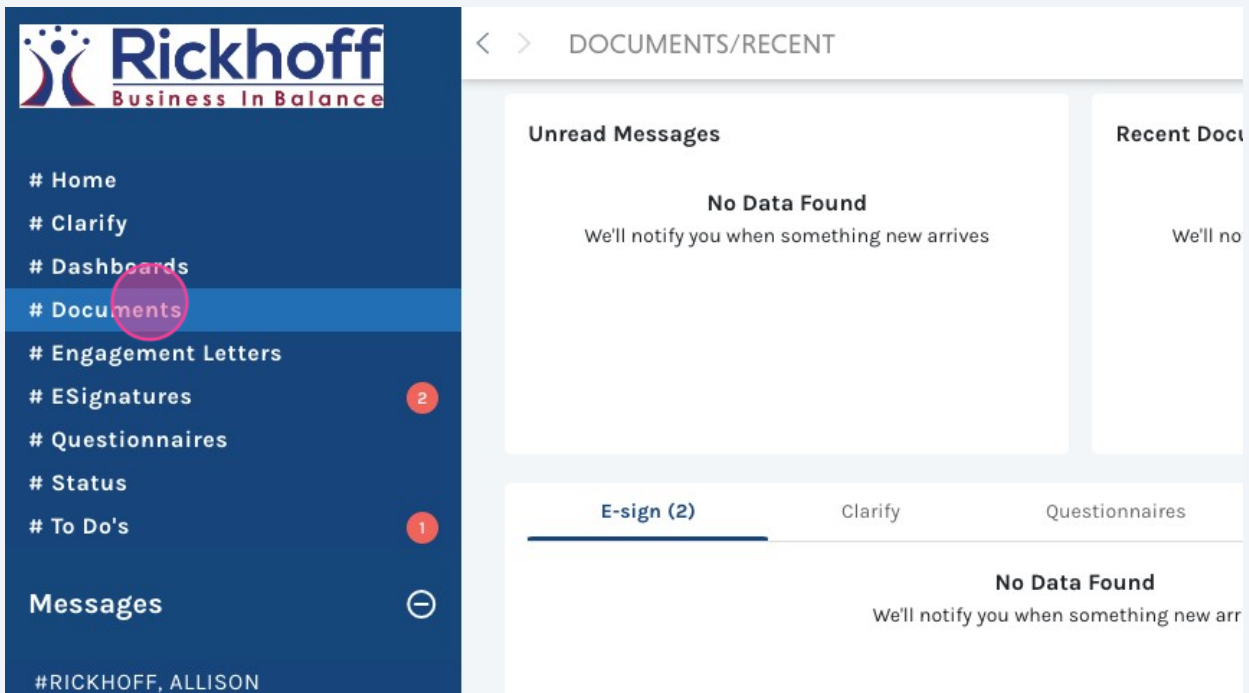
Signer 1 : ALLISON RICKHOFF ✓

Download eSign document : 

13 Click "home" to go back to the home dashboard.



14 Click "# Documents" to view the documents you signed and any action items needed on your end.



15 Click here.



16 Click "Tax Returns - Action Items" to view the documents to sign and any payments that may need made.

Name	Last Modified
File Exchange - Upload	05/30/2024 15:35:2
Financial Statements - Client	11/17/2023 07:33:57
Sales Tax - Client	01/06/2023 08:07:0
Tax Returns - Action Items	03/05/2024 18:46:0
Tax Returns - Client	11/17/2023 07:24:20
Tax Returns - Organizer	03/05/2024 19:02:0
Tax Returns - Other Tax	03/05/2024 18:25:4

17 Click "2023"

The screenshot shows a file explorer interface. At the top, the breadcrumb path is 'RICKHOFF, ALLISON > Tax Returns - Action Items'. A red banner below the path reads 'This is a read only folder, navigate to a different location'. Below this is a table with two columns: 'Name' and 'Last Modified'. The table contains three rows representing folders for the years 2022, 2023, and 2024. The '2023' folder is highlighted with a pink circle.

Name	Last Modified
2022	03/05/2024 18:46:00
2023	03/07/2024 17:40:00
2024	03/05/2024 18:46:00

18 Click "US_TaxReturn-ActionRequired.pdf". Here is where each return action items will be shown. If you have to make a payment to an agency the voucher and instructions will be in this folder for you to print off and mail your payment.

The screenshot shows a file explorer interface. At the top, the breadcrumb path is 'RICKHOFF, ALLISON > Tax Returns - Action Items > 2023'. A red banner below the path reads 'This is a read only folder, navigate to a different location'. Below this is a table with two columns: 'Name' and 'Last Modified'. The table contains two rows representing PDF files. The 'US_TaxReturn-ActionRequired.pdf' file is highlighted with a pink circle.

Name	Last Modified
IL_TaxReturn-ActionRequired.pdf	03/07/2024 17:40:00
US_TaxReturn-ActionRequired.pdf	03/07/2024 17:40:00

19

Click on the icon to expand the documents to print off. In the window that you will be directed to is where you can print off your documents if needed.

The screenshot shows a document viewer interface. At the top, there is a search icon and the word "DOCUMENTS". Below that, a blue header bar reads "Documents / RICKHOFF, ALLISON". The main content area displays a document titled "US_TaxReturn-ActionRequired.pdf" with a close icon. A teal button labeled "View In New Tab" is overlaid on the document. The document itself is Form 8879, dated 3/07/2024 11:40 AM. It includes the IRS logo and the text "IRS e-file Signature Authc". Key information includes: Form 8879 (Rev. January 2021), Department of the Treasury Internal Revenue Service, Submission Identification Number (SID) field, Taxpayer's name ALLISON RICKHOFF, and Spouse's name field. The document is titled "Part I Tax Return Information - Tax Year Ending December 31, 20" and includes instructions: "Enter whole dollars only on lines 1 through 5." and "Note: Form 1040-SS filers use line 4 only. Leave lines 1, 2, 3, and 5 blank." The first line item is "1 Adjusted gross income".