

Complete an eSign Request on Mobile

Your tax professional may send you a document that requires signing. You can electronically sign a document from your mobile device by using the client portal application.

To get started, log into the [Client Portal mobile application](#).

- 1. Navigate to the To-Do tab.**
- 2. Choose an applicable *eSign request*.**



3. Click *View and sign*.



4. Tap the *Edit* pencil to change your signature font.

Once you have selected a signature font, tap **Use this signature**.



5. After you have read and agreed to the document, tap **Apply signature and agree**.

8:20

Back Signature Required

0/1 Signatures completed

Trustee's proposed resolution

Conclusion

Please feel free to contact me directly jane.smith@irs.gov if you have any questions. Thank you for your time and consideration of this matter.

Sincerely yours,

[Professional's Name]

Attachments:

By continuing you agree to be legally bound by this document

Apply signature and agree

6. Verify the document and tap **Complete and send**.

8:20

Back Signature Required

1/1 Signatures completed

Trustee's proposed resolution

Conclusion

Please feel free to contact me directly jane.smith@irs.gov if you have any questions. Thank you for your time and consideration of this matter.

Sincerely yours,

[Professional's Name]

Attachments:

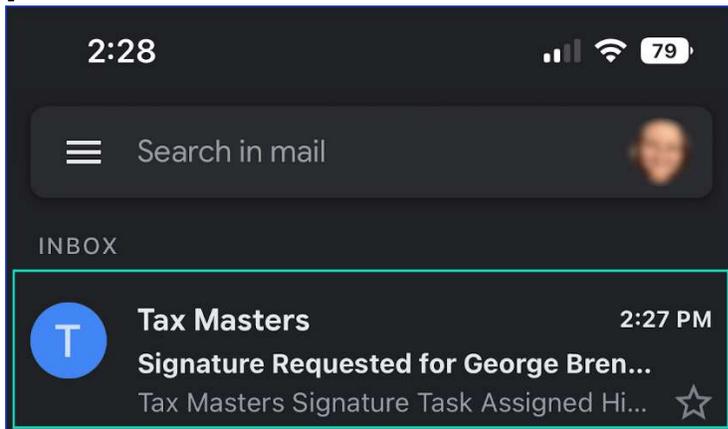
You've completed all signatures.

Complete and send

Complete an eSign Request with Secure Links

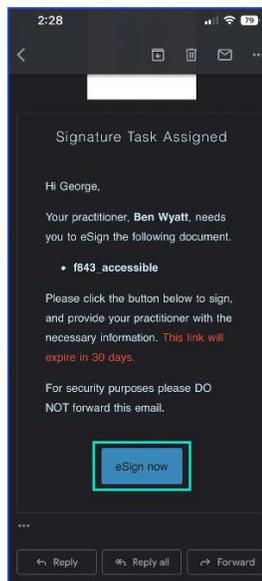
Alternatively, you do not have to be invited to the client portal in order to sign documents. Your practitioner may choose to send an eSign request through email, using secure links.

1. Navigate to the eSign request email from your practitioner.

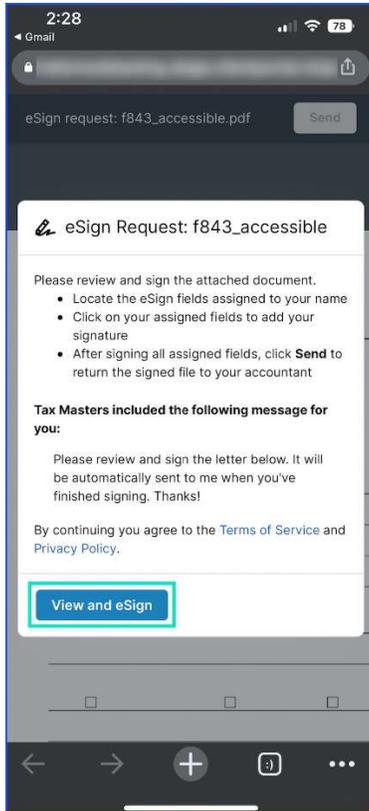


2. Click *eSign now*

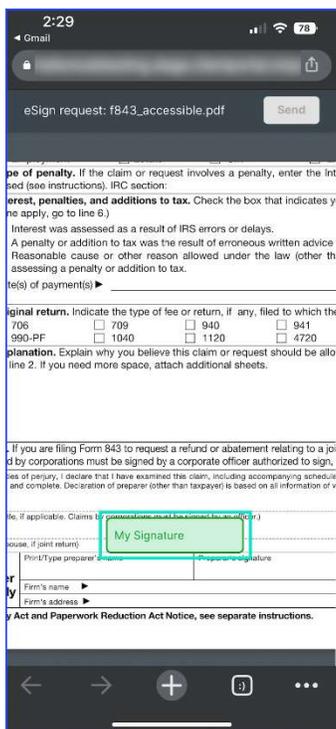
- Take note that the link to eSign will expire 30 days from the opening link.
- Under no circumstances should you forward this email.



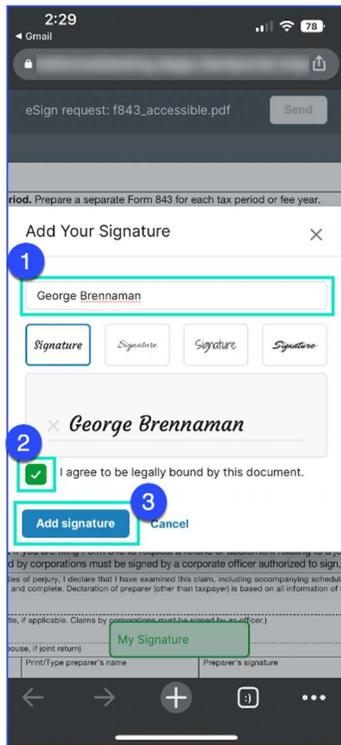
3. Once the browser opens, click *View and eSign*.



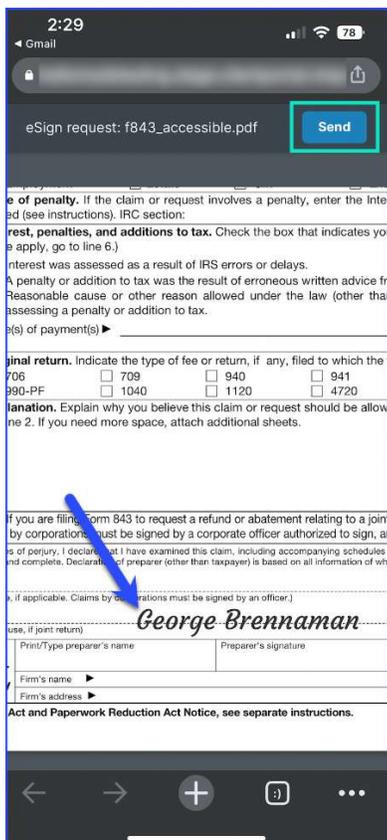
4. Find the green *My Signature* field in the document.



5. Enter your signature in the *Add Your Signature* pop-up, then select *Add signature*.



6. Verify your signature and then click *Send*.



7. Once the file is successfully sent, you are good to go!

