

Form 1040 Delivery in the Age of AI

E-signature compliance, secure client communication standards, and client experience

INCPAS Webinar | August 25, 2026

Speaker

- Speaker at Accountex, NATP, NAEA, AICPA and leading industry conferences
- Advises 1,000+ accounting firms worldwide
- Leads Marketing, Sales and Customer Success at TaxDome



Petar Iliev
Chief Revenue Officer

Our roadmap for today

- Why Form 1040 delivery matters more than ever in the age of AI
- What your client experiences between preparation and e-file submission
- From notification to Form 8879 authorization — a five-stage delivery framework to meet IRS requirements
- What data from 15,000+ firms reveals about the gap between preparation and filing

How much do you worry that AI will commoditize what you do?

A lot — clients can already use AI for simple returns

Some — but I think client relationships protect us

Not really — AI is a tool, not a replacement

Haven't thought about it much

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The AI Era: compliance risk and opportunity

30 Years Ago The Office Era

You walked clients through their return across the table. Highly personal, but impossible to scale.

The Email Era Fast, but flat

"Here's your PDF." Delivery became instant, but it stripped out the personal touch. Clients can't feel the hours you spent.

The AI Era Risk and opportunity

If your delivery feels like what an algorithm could send, clients have no reason to stay. The opportunity: technology that carries the relationship.

Where would you place YOUR firm's delivery today?

The Office Era — we still meet most clients in person

Mostly Email Era — "Find attached" with a PDF

Transitioning — we have a portal but it's mostly email-driven

AI Era — structured digital delivery with personal touches

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This is what your client sees

What does John do next?

 **Your 2025 Tax Return**

Hi John,

Please find attached your 2025 tax return.
Let me know if you have any questions.

Best,

 Smith_1040_2025.pdf — 147 pages

When your client receives their completed return, what do they experience?

A series of emails with attachments

A structured package they can review in one place

A personalized walkthrough of their return

I'm not sure what it looks like from their side

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Your tax return delivery and 8879 authorization is the last thing your client remembers before next year

You're not closing a project. You're completing the last compliance step your client actually sees.



Clients' perception of the level of service they're getting from us is higher because they're getting constant communication from us.

Olga Hurtado

Founder, NeatBooks, 20+ staff | 250+ clients

What your client should experience

Each compliance step between preparation and filing is a moment your client experiences



Clear Notification. They know exactly what to do next.



Contextual Introduction. An explanation of their return directly from the firm.



Targeted Review. Highlighted pages and a clear tax summary — not raw files.



Frictionless Signing. Form 8879 authorization as a natural next step, not a separate tool.



Seamless Payment. Payment feels like part of the delivery, not a separate conversation.

Authorization is the gate. Keep it simple.

What breaks here?	What to do?
Client delays — not signed on time	Send automatic reminders until signed
Confusion about what they're signing	Make clear what the 8879 is and why it's required
Technical friction with the signing tool	Use built-in e-sign — no separate portal, no extra login
No visibility into signature status	Track signature status in real time
Feels like a hoop, not part of the relationship	Add a one-line "why" next to the signature



The clients love having only to go to one place to upload, sign, and retrieve documents.

Paige Evans
Client Engagement Coordinator | 20-20 Accounting Solutions
16 staff | 300+ clients

The Introduction: Make it Personal

The digital equivalent of sitting across the table.



2-minute video walkthrough

What it sounds like:

"Hey John, quick overview — your refund is a bit smaller this year because of X. On page 12 you'll see the estimated payments for next year. Call me if you have questions."

An algorithm cannot replicate your face, your voice, or your specific knowledge of their financial situation.

Delivery package

 **Group pages for client**
Help the client navigate the return

 **Intro**
Add a letter and/or multimedia summary

 **Highlights 1**
Point out the most important pages to review

 **Signature requests 4**
Collect authorizations to file the return

 **Invoice**
Collect payment for services

 **Payment vouchers 4**
Include pages with payment instructions

 **Full document 26**
Available to download for client's records

Hi Daniel,



Your 2025 federal return is ready for review. Numbers are in line with what we discussed — total income of \$128,400 and a balance due of \$3,640.



Watch the walkthrough

2:14

▶ Watch the walkthrough

▶ Watch the walkthrough

A couple of things worth flagging as you look it over:



See what structured delivery looks like in practice.

The Review: Structured, Not Overwhelming

A tax return is like a product manual — nobody reads it unless they do it for a living.

What most clients get
147-page PDF attached to an email
No guidance on what to look at
"Let me know if you have questions"
Separate invoice arrives days later
No idea when payments are due

What a structured delivery looks like
Highlighted pages with what matters
Clear tax summary: owed, due dates, refunds
Personal note or video from preparer
Signing and payment in the same flow
Full return available if they want to dig in

**From the day you finish a return —
how long does it typically take to get
paid?**

1-3 days

4-7 days

8-14 days

2+ weeks

It's all over the map — depends on the client

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Sign and Pay: One Place, One Flow

When Form 8879 signing and payment are in one experience, clients complete it faster — not because you chased harder, but because they didn't have to context-switch.

2.5x
faster payment

Firms that connect the invoice directly to the deliverable collect payment in 4.4 days vs. 11 days.

Payment feels like a natural step in the delivery, not a separate awkward conversation.

Source: TaxDome Industry Index, Q1 2026 | 15,000+ firms

Form 8879

The Gatekeeper to E-Filing

No 8879 = No filing

Authorizes you to e-file on behalf of the client

Without signature → you cannot file

Without 3-year retention → you're not compliant

Documentation must be **retained** (IRS Pub 1345)

Practitioners must follow due **diligence standards**
(Circular 230, AICPA SSTs)

Even the compliance
step can feel human – if
it's clear, branded, and
inside the same tool the
client already uses.

The Full Lifecycle: Proposal to Delivery

1. The Proposal

Structured package + 2-minute video introducing yourself and defining the scope.

2. The Delivery

Structured package + 2-minute video walking through the return and next steps.

**4 minutes total per client
per year**

That's the bridge between 30 years ago and today.

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2025_Form_1040_Federal_Return.pdf

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\$450.00

Date posted

Apr-10-2026

Client

Daniel R. Hayes

Description

U.S. Individual Income Tax Return

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Invoice details

Amount to pay ⓘ

\$ 450.00

Payment method

Bank Account 2227

Bank debit

Bank Account 6789

Bank debit

<

2025_Form_1040_Federal_Return.pdf

↓

Hi Daniel,

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2025_Form_1040_Federal_Return.pdf

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City, state, ZIP
Brooklyn, NY 11205

Filing Status

☒ Single

☐ Married filing jointly

☐ Married filing separately

☐ Head of household

Income

1a Wages from Form W-2

1b Household employee wages

2a Tax-exempt interest

2b Taxable interest

3a Qualified dividends

3b Ordinary dividends

7 Capital gain or (loss)

8 Other income

9 Total income

142,500

—

320

1,840

4,200

4,200

8,750

—

178,400

Tax summary

▼

Tax summary

🔔

Payment reminders are on

You'll get a reminder 14 days before each due date

Taxes owed

\$3,640.00

Federal

\$3,640.00

Payment method

Federal/Authority portal

Due date

Apr-15-2026

Reminder date

Apr-01-2026

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Next →



See what structured delivery looks like in practice.

Which of these would make the biggest difference for your clients?

Adding a video walkthrough to your delivery

Consolidating everything into one client experience

Connecting payment to the deliverable

Adding a personal video to proposals

Just being more consistent and timely

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The Behavioral Shift: What the Data Shows

The relationship isn't moving away from digital — it's moving into it.

90%

of TaxDome clients return after
their first login

2.5x

faster payment when invoices
are connected to deliverables

+187%

growth in digital chat
interactions between firms
and clients

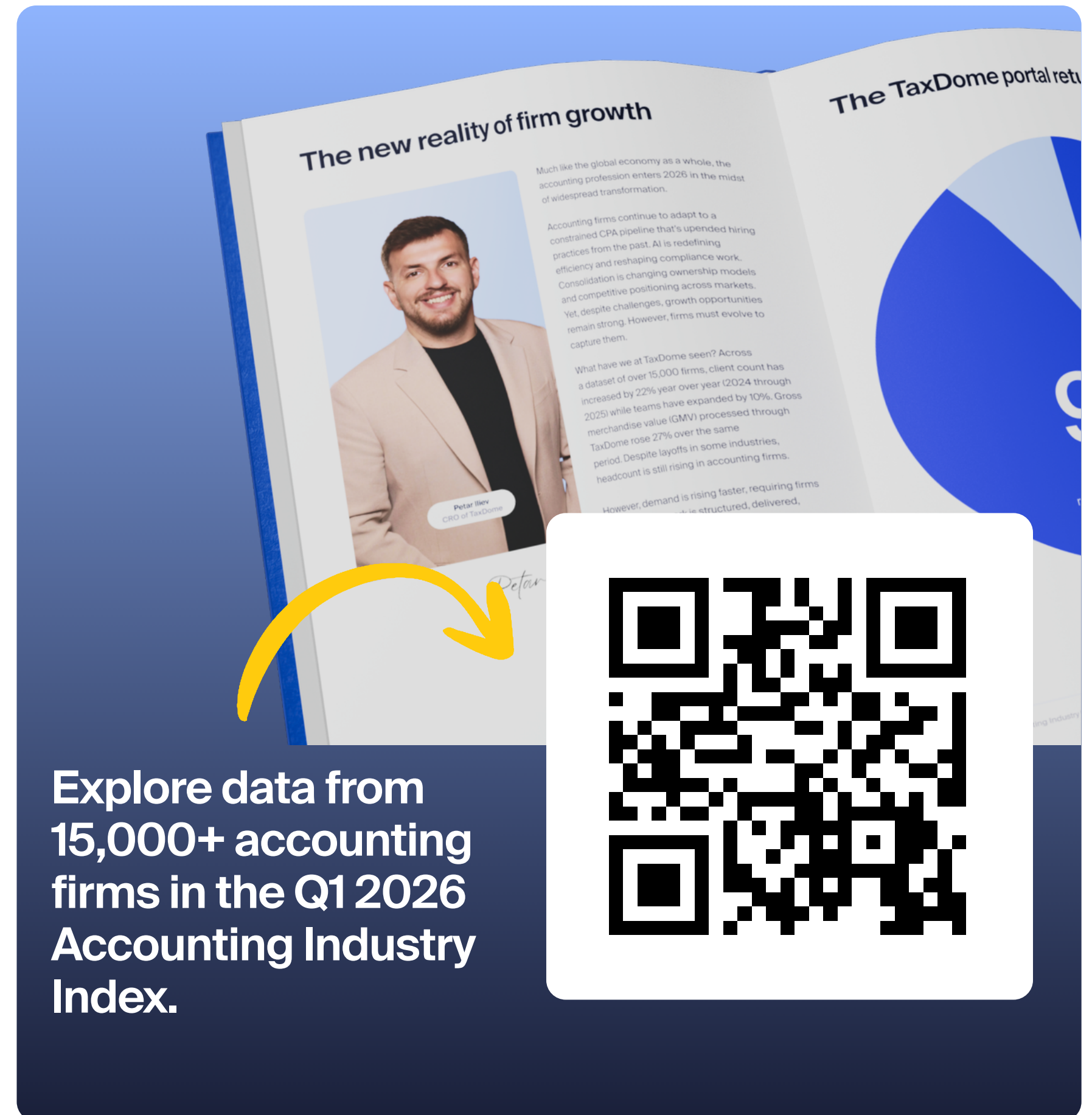
Source: TaxDome Industry Index, Q1 2026 | 15,000+ firms

See how your firm compares across the full client lifecycle.

A preview from the Industry Index — tied to the stages you just saw:

- **2.5x faster payment** — firms that link documents to invoices collect in **4.4 days vs. 11.**
- **90% of clients return** after one portal login — no reverting to email or phone.
- **6x lower client inactivity** when clients use a single app login.
- **+187% growth in chat interactions** between firms and clients. The portal isn't replacing the relationship — it's where the relationship lives now.

Built from operational data on 15,000+ firms, 2024–2025. Scan QR code to see where your firm stands.



Explore data from 15,000+ accounting firms in the Q1 2026 Accounting Industry Index.



Q&A



Petar Iliev

Chief Revenue Officer