

HubSync FAQs

What is HubSync?

HubSync is a secure online platform that streamlines the way clients receive, review, and sign their tax and engagement documents with KSM. Through HubSync, clients can securely upload documents, complete required questionnaires, and electronically sign forms – all in one convenient location. You can learn more about the platform at <https://hubsync.com/about>.

I received an email from AssureSign. Is it safe?

Yes. AssureSign is a secure electronic signature service used by HubSync. When you receive an AssureSign email, you can safely follow the link to review your document, select your signature style, and apply your electronic signature where prompted.

I can't log in. What should I do?

Start by clicking “Forgot your password?” on the HubSync login page and follow the steps to reset it. If you still can't access your account, please contact the KSM Client Support Team at KSMclientsupport@ksmcpa.com or your KSM advisor for additional assistance.

What if I prefer not to sign electronically?

HubSync's e-signature process is secure and provides the fastest turnaround. However, if you prefer to sign manually, please contact your KSM advisor to discuss alternative options.

Can I adjust how often I receive HubSync email notifications?

Yes. After signing in to HubSync, click your name in the upper-right corner and select Notifications to update your email preferences. You can choose instant alerts or a consolidated daily digest that summarizes key activity across your workspaces.

I'm being asked to verify my identity when signing (via code or KBA). Why?

For your protection, HubSync uses Knowledge-Based Authentication (KBA) and SMS or voice verification to confirm your identity before you sign certain forms, such as Form 8879. You may be asked to answer brief identity questions or enter a one-time code sent by text or phone call. This step ensures that only authorized individuals can access and sign your documents.

How do I sign my tax return (Form 8879)?

When your return is ready, you'll receive an email from AssureSign or a HubSync notification. Click Review and Sign to open the document and follow the on-screen prompts to complete your electronic signature. If applicable, both the taxpayer and spouse will receive separate email invitations and can sign electronically from their own accounts.

Can I view or download signed documents later?

Yes. All signed documents are securely stored in your HubSync workspace under the File Cabinet tab, where you can view or download them anytime.

How do I send documents to KSM?

You can securely upload documents directly in your HubSync workspace using the Upload Documents feature. You may also respond to a File Request link sent by your KSM advisor.

Can I access HubSync from my phone or tablet?

Yes. HubSync supports mobile browsers, allowing you to review, sign, and upload documents from any smartphone or tablet.