






# K-1 Distribution Quick Reference Guide

Click **Distribute K-1s**.



 Tax year: 2019  
  Contact Person  
  GE MONEY FINANCIAL INSTITUTION ▾  
 

### 2019 Tax Return

**Refunds**

Federal	\$10,000
Colorado	\$41,784
<b>Total</b>	<b>\$51,784</b>

**Overpayments Applied**


Colorado	\$100
<b>Total</b>	<b>\$100</b>

**Payments Due**


Alabama	\$12,345
California	\$12,345
<b>Total</b>	<b>\$24,690.00</b>

### All required steps for your 2019 tax returns have been completed!


You can access and manage all of your tax documents by selecting an option below




[Make Tax Payments](#)




[Distribute K-1s](#)




[Download Tax Documents](#)



[View Tax Return](#)




[View or Download Signed Documents](#)



[View and Download Paper File Returns](#)

Due per invoice



[Pay or View Tax Preparation Fees](#)

### 2020 Estimated Payments

**Q1**

Colorado	\$1,929
<b>Total</b>	<b>\$1,929</b>

**Q2**

Colorado	\$2,029
<b>Total</b>	<b>\$2,029</b>

**Q3**

Colorado	\$2,029
<b>Total</b>	<b>\$2,029</b>

**Q4**

Colorado	\$2,029
<b>Total</b>	<b>\$2,029</b>

Click **Send Electronically**.

**HATFIELD & ASSOCIATES** Tax year: 2019 Contact Person GE MONEY FINANCIAL INSTITUTION

Summary Review Sign PaperFile **Distribute** Pay

### Distribute K-1 Documents to Partners

Select the method you would like to distribute your K-1's

**SEND**  
Electronically **1**  
Email them from this website

Mail Hard Copies  
Download Print, and Mail

Back Continue

## K-1 Distribution Quick Reference Guide


1. Click the **pencil icon** in the Action column to edit each shareholder's contact information.
2. Add the shareholder's email address.
3. Click **Save**.
4. Once shareholder information is added, check the box next to each shareholder K-1 to be distributed.
5. Click **Email Documents**.
6. Click **Done**.

The screenshot shows the 'Distribute K-1 Documents Electronically' interface. At the top, there is a header with the HATFIELD & ASSOCIATES logo, 'Tax year: 2019', 'Contact Person', and 'GE MONEY FINANCIAL INSTITUTION'. A 'Download All K-1s' button is in the top right. Below the header, there is a 'Select Partners to Email' section with a 'Search Partners' input field. A table lists partners with columns for 'Partners', 'Email', 'Mobile', 'Status', and 'Action'. The table contains six rows, each with a checkbox, a partner name, an empty email field, an empty mobile field, a 'Not Sent' status, and an 'Action' column with a pencil icon and a download icon. A red circle with the number '4' is next to the first checkbox, and a red circle with the number '1' is next to the first pencil icon. Below the table is a 'Back' button. An 'Update K1 Partners Details' modal is open, showing fields for 'Name' (MARKUP ASSOCIATES), 'SSN/EIN' (154-35-4545), 'Address', 'Email' (with a red circle '2' next to the input), 'Mobile' (with a dropdown and a field containing '()-'), 'Partner Type' (Individual), and 'Status' (Pending). A checkbox for 'Send update notification email to GE MONEY FINANCIAL INSTITUTION' is checked. A red circle '3' is next to the 'Save' button. At the bottom of the modal are 'Cancel' and 'Save' buttons. Below the modal, there are 'Email Documents' and 'Done' buttons, with a red circle '5' next to 'Email Documents' and a red circle '6' next to 'Done'.


<input type="checkbox"/>	Partners	Email	Mobile	Status	Action
<input type="checkbox"/>	BIO CHEMICALS			Not Sent	
<input type="checkbox"/>	JNY PARTNERS			Not Sent	
<input type="checkbox"/>	MARKUP ASSOCIATES			Not Sent	
<input type="checkbox"/>	PAUL HANSON			Not Sent	
<input type="checkbox"/>	TARAA RODRICKS			Not Sent	

## K-1 Distribution Quick Reference Guide














1. The Status column will display tracking information.
2. Click the **Resend icon** to deliver a new link to the K-1 upon shareholder request.

Tax year: 2019 Contact Person GE MONEY FINANCIAL INSTITUTION Download

### Distribute K-1 Documents Electronically



Select Partners to Email

<input type="checkbox"/>	Partners	Email	Mobile	Status <b>1</b>	Action
<input type="checkbox"/>	BIO CHEMICALS	bruceisincognito@gmail.com		Downloaded on 01/13/202...	  
<input type="checkbox"/>	JNY PARTNERS			Not Sent	 
<input type="checkbox"/>	MARKUP ASSOCIATES	clarkisincognito@gmail.com		Sent on 01/12/2022 03:56 ...	   <b>2</b>
<input type="checkbox"/>	PAUL HANSON	alfredisincognito@gmail.com		Sent on 01/12/2022 03:56 ...	  
<input type="checkbox"/>	TARAA RODRICKS			Not Sent	 

[Back](#)

[Email Documents](#) [Done](#)