



# Tax Time Simplified

TaxCaddy makes gathering tax documents and sharing them with your tax professional a breeze. Let TaxCaddy retrieve your 1099s, 1098s and W-2s automatically. Upload or snap photos of your tax documents year-round and store them with bank vault security. Electronically sign your tax documents from anywhere. Pay your accountant's invoice. Make your Federal and State tax payments right from TaxCaddy.

No more office visits.

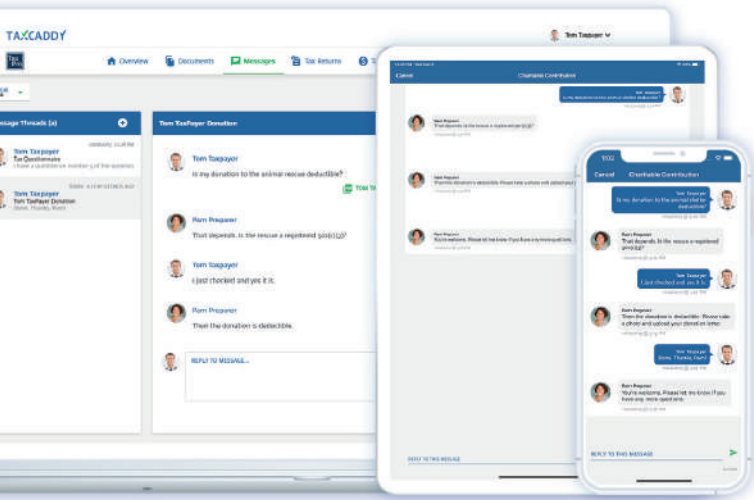
No more paper organizers.

**Simplify tax time with TaxCaddy.**



# You own it

TaxCaddy is not your accounting firm's portal. Your TaxCaddy account is yours to keep, forever. You decide who to share your information with. And if you change accounting firms, you take your TaxCaddy account with you.

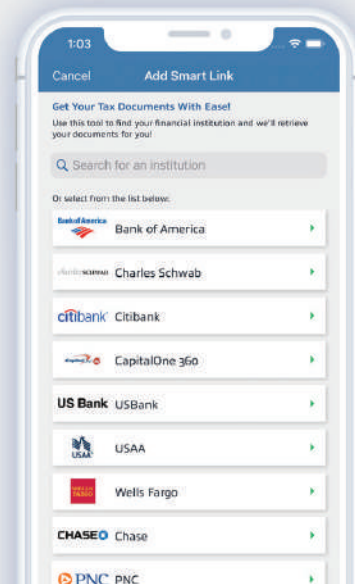


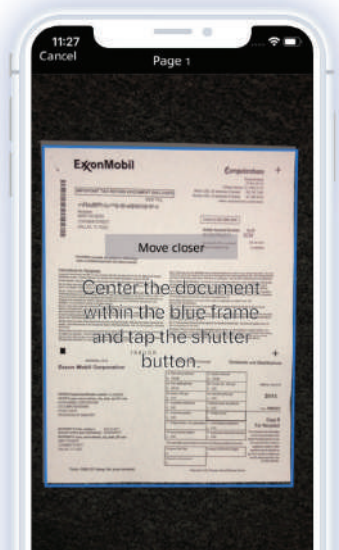
## Any device PC, Mac, tablet, mobile phone

TaxCaddy enables you to collaborate, share, and communicate with your tax professional from anywhere, on any device: PC, Mac, tablet, and mobile for both iPhone and Android.

## Automated document retrieval

Link TaxCaddy to over 300 banks, brokerages, and payroll service providers to automatically fetch documents like W-2s, 1099s, and 1098s. TaxCaddy retrieves your documents for you!



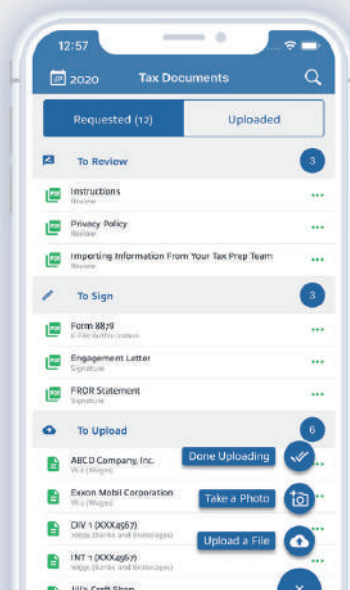


## Take a photo

Use the TaxCaddy app for iPhone and Android to photograph and upload documents as you receive them. Categorize them on the spot then shred the paper.

## Upload from your PC, Mac, tablet, or phone

Browse your PC, Mac, tablet, mobile phone, Google Drive, and Dropbox to upload PDF files, Excel spreadsheets, Word documents, and more.

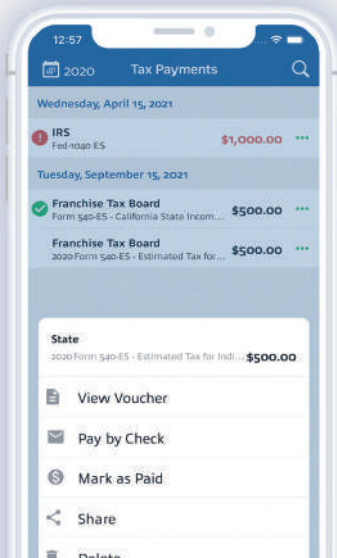
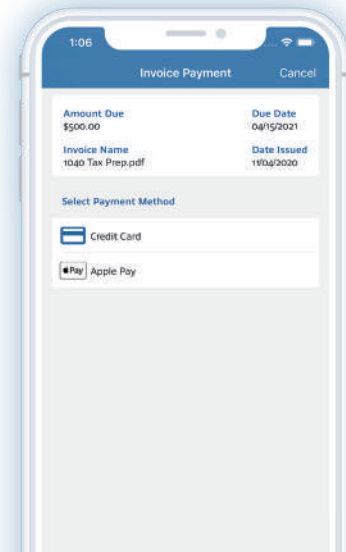


## Electronic signatures Sign anything, anywhere

From your PC, Mac, tablet, or mobile phone electronically sign engagement letters, consent requests, e-file authorizations, and other documents. 100% IRS compliant.

# Invoicing

Once you've reviewed and downloaded your tax return, paying your tax professional's invoice couldn't be simpler with with ACH, credit card, or even Apple Pay and Google Pay.



## State and Federal tax payments

Pay your State and Federal tax payments directly from the TaxCaddy app. No more handwritten checks and no more visits to the state and IRS websites!

## Trusted by some of the largest firms in the world



Ensures data security through encrypted communications, threat management, and mitigation practices.



Your documents are encrypted in transit and at rest using best-in-class Secure Socket Layer encryption.



Independently audited, tested, and validated by C-Level Security, LLC to ensure a secure processing solution.