



## 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.

Your tax professional's work is complicated. Your part should not be. **Simplify tax time.**

# You own it

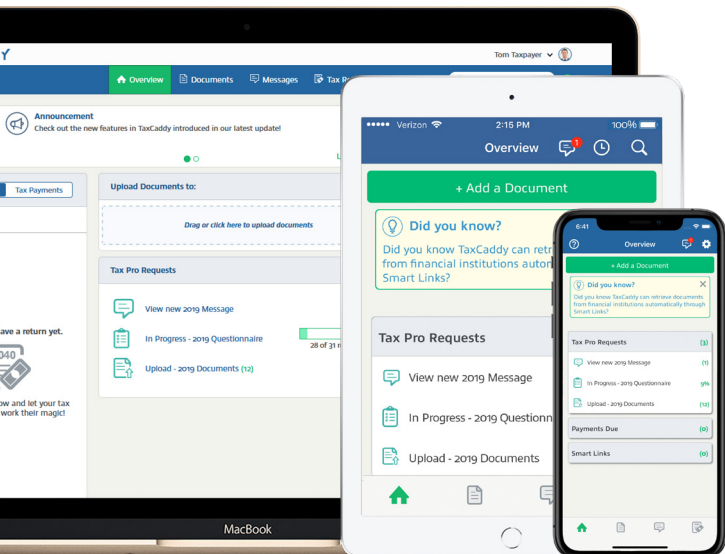
TaxCaddy is not your accounting firm's portal. Your TaxCaddy account is yours to keep, forever. You decide who to share your information with. And if you change accounting firms, you take your TaxCaddy account with you.



## Any device

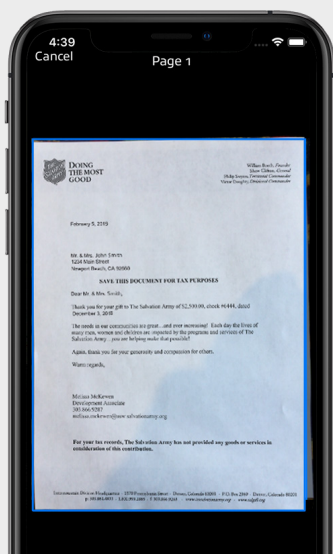
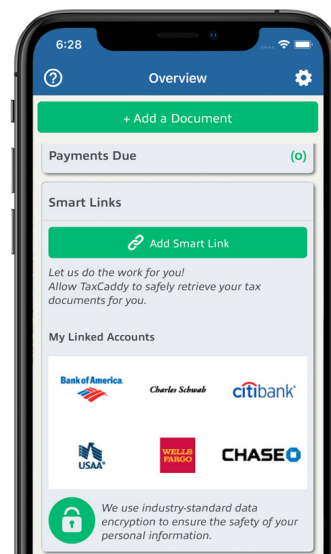
PC, Mac, tablet, mobile phone

Respond to a document request on your office PC. Use the mobile app to ask your tax professional a question while you're waiting to board your flight. View and approve your return on your tablet from the comfort of your sofa. TaxCaddy enables you to collaborate, share and communicate with your tax professional from anywhere, on any device.



# Automated document retrieval

Link TaxCaddy to over 300 service providers to automatically fetch documents like W-2s, 1099s and 1098s. TaxCaddy will retrieve your documents for you.

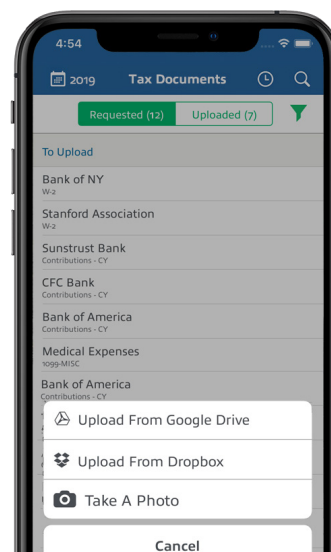


## Take a photo

Use the TaxCaddy mobile app to photograph and upload documents as you receive them. Categorize them on the spot then shred the paper. (Download TaxCaddy for iPhone on the App Store or for Android on Google Play.)

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

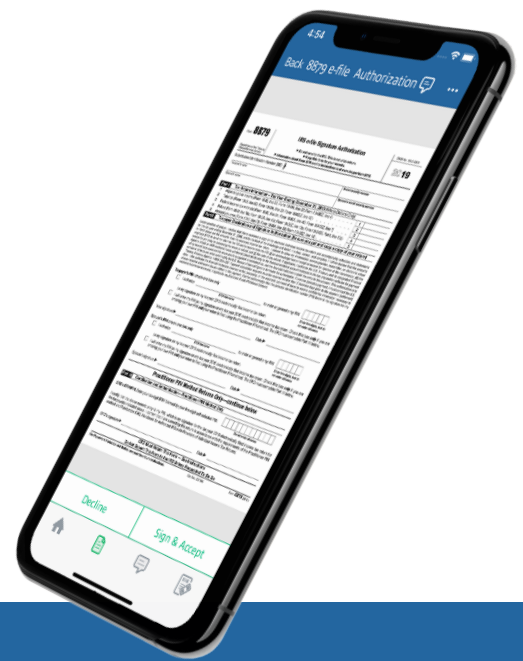
Browse your PC, Mac, tablet, mobile phone, Google Drive and Dropbox to upload PDF files, Excel spreadsheets, Word documents and more.



# 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.



## Solid, safe and secure

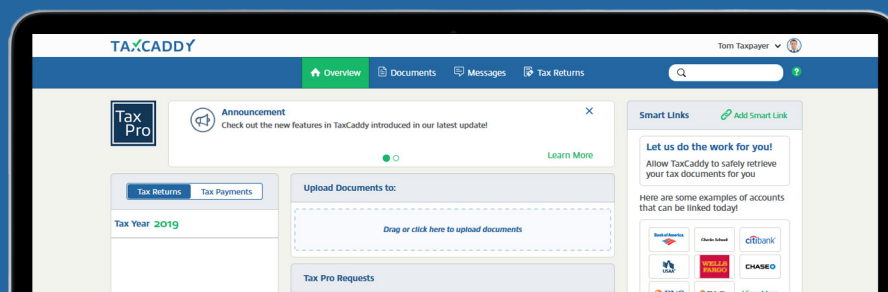
Trusted by some of the largest CPA firms in the world



TaxCaddy leverages Microsoft's Azure infrastructure to ensure data security through encrypted communications, threat management and mitigation practices, including regular penetration testing.

TaxCaddy uses Amazon Web Services for secure, reliable storage. Your documents are encrypted in transit and at rest using Amazon's best-in-class Secure Socket Layer and Server Side Encryption technologies.

TaxCaddy has been independently audited, tested and validated by C-Level Security, LLC. The C-Level Certified Seal verifies that TaxCaddy employs the strictest security steps for safeguarding your data.



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taxcaddy.com



# TAXCADDY