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Is Compiling Your 2018 1040 Documents Painful? Sign up for TaxCaddy with Schneider Downs to Reduce Your Tax Compliance Burden

TAX
BY ZACHARY DAVIS

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Tax simplification has arrived! Schneider Downs is proud to introduce TaxCaddy, for our individual tax clients. TaxCaddy is a safe and secure software solution that will reduce the amount of time you spend collecting your annual tax data. TaxCaddy leverages the capabilities of today's technology to make it easier for you to send us the materials needed to complete your annual Form 1040.

Whether you use a PC, Mac, tablet, or mobile phone, TaxCaddy has the capability to retrieve your Forms 1099, Forms 1098 and W-2s directly from the payor, bank and your employer, and send them electronically to your Schneider Downs tax engagement team. Documents that you choose not to link can be scanned or photographed and uploaded to TaxCaddy when they arrive in the mail using the TaxCaddy mobile application. No more paper, stamps or envelopes!

In addition to easily capturing and securely storing tax documents, your TaxCaddy account maintains a complete inventory of your tax data, including a record of all the information that has been reported on your past returns.

Simplifying the tax data gathering process is an innovation that provides convenience for our clients, while allowing our professionals to focus on tax planning strategies. Schneider Downs is extremely excited about teaming up with TaxCaddy to utilize this powerful and innovative solution that we feel will provide our clients with a more seamless and less stressful tax compliance experience in 2019 and beyond.

To learn more, please contact your Schneider Downs advisor.

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PITTSBURGH

One PPG Place, Suite 1700
Pittsburgh, PA 15222

contactsd@schneiderdowns.com
p:412.261.3644 f:412.261.4876



COLUMBUS

65 East State Street, Suite 2000
Columbus, OH 43215

contactsd@schneiderdowns.com
p:614.621.4060 f:614.621.4062



WASHINGTON, D.C.

1660 International Drive, Suite 600
McLean, VA 22102

contactsd@schneiderdowns.com
p:571.380.9003



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