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What's the Fuss About TaxCaddy?

PRIVATE CLIENT SERVICES, TAX
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We are approaching our individual tax clients about the opportunity to use a new, secure software product called “**TaxCaddy**” to streamline your tax-prep process. **TaxCaddy** is a cutting-edge software solution that we are offering to our 1040 clients to gather and share their tax documents with us. It is our hope that this product significantly cuts down the time and effort our individual clients expend each year, and that it will make tax time much less taxing!

The old way of gathering personal documents was time-consuming and cumbersome:

- Wait for envelopes to arrive in the mail with important tax documents
- Gather all of the documents, (be careful not to misplace any) and get them to your CPA either by mail or in person
- Be sure to tell your CPA about changes that happened to you over the past year, most likely by completing the huge paper “organizer”
- Oh, no! A corrected document arrived in the mail – now you've got to get it to your CPA and hope that it doesn't get “lost in the paper shuffle”
- The CPA has returned all of your documents; now how should they be stored?

TaxCaddy has the answer to streamline the process and get individual tax information to your CPA all year round with no stamps, envelopes or trips to the Post Office. Plus, it makes document storage electronic, so no more huge files of paper!

When you sign up for this free service, you'll enjoy the following:

- The account will belong to you; it's not a Schneider Downs portal – So, even if you leave Schneider Downs, your account goes with you.
- All documents uploaded will remain in digital form, so you don't have to store paper copies.
- You can link bank and brokerage accounts, which will enable your year-end tax statements (Forms 1099) to be retrieved automatically without your having to upload them.
- Documents that you scan can be "dragged & dropped" into your account.
- Utilizing the mobile app, you can snap and transmit photos of documents, so you don't need to scan everything.
- Your account is available year-round, so a charitable receipt that you get in June doesn't have to be located in February when you are gathering your tax documents.
- You'll see a real-time document request list, so you know which documents you still need to provide to your CPA.
- You'll have the ability to digitally sign documents, such as your engagement letter and electronic filing authorization forms, making such communications instantaneous.
- Security! **TaxCaddy** employs best-in-class encryption and threat management and mitigation practices, including regular security penetration testing.

We believe that all of our individual clients will love using **TaxCaddy**. In order to get started, please send an email to:

TaxCaddy@schneiderdowns.com

You'll receive an invitation with further instructions which will enable you to establish your **TaxCaddy** account. At that point, you can share access with a spouse, family member, or trusted professional.

If you'd like to discuss the **TaxCaddy** technology further, please contact your Schneider Downs professional tax team member.

