

Getting started is as easy as 1, 2, 3

TaxCaddy is an exciting new solution that simplifies tax time by allowing you to collaborate with your tax professional more easily than ever before. Following is a getting started overview.

Learn more at taxcaddy.com. For detailed instructions on getting started visit the [Help Center](#).

1 Sign Up

You will receive a TaxCaddy invitation email from your tax professional. From the email, click the Sign Up Free button. Create a password, select your three security questions and follow the steps to create your TaxCaddy account.

2 Connect

Log in to your TaxCaddy account and accept your tax professional's connection request. Accepting the connection request allows your tax professional to send you messages and requests, see your tax documents, send you letters and upload your tax return for your review.

3 Begin

Your spouse or a financial advisor can be added as an additional user and granted access to your TaxCaddy account at any time. Link to your banks and brokerages and let TaxCaddy automatically retrieve your tax documents. Install the TaxCaddy app for iPhone or Android to take photographs of paper documents as you receive them.



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. No more office visits. No more paper organizers.

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

You own it

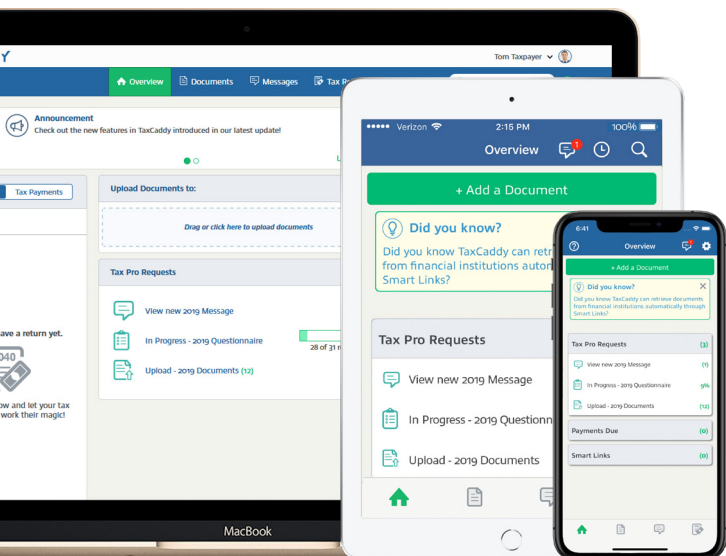
TaxCaddy is not your accounting firm's portal. Your TaxCaddy account is yours to keep, forever. You decide who to share your information with. And if you change accounting firms, you take your TaxCaddy account with you.



Any device

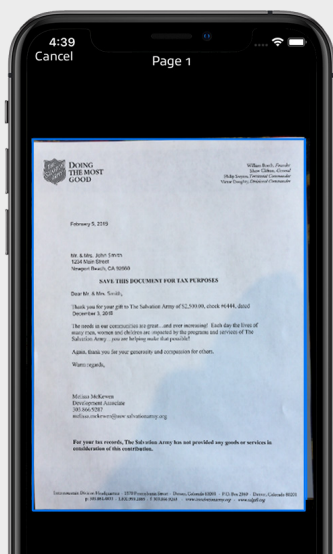
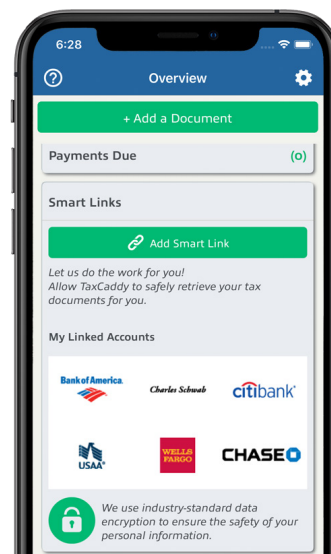
PC, Mac, tablet, mobile phone

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.

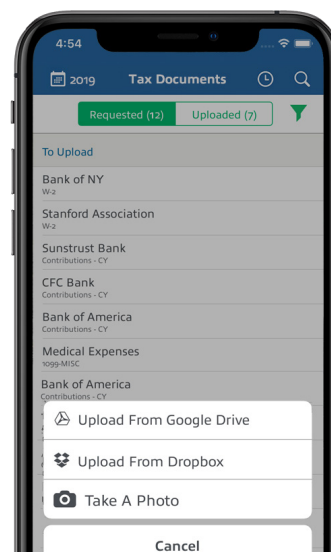


Take a photo

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

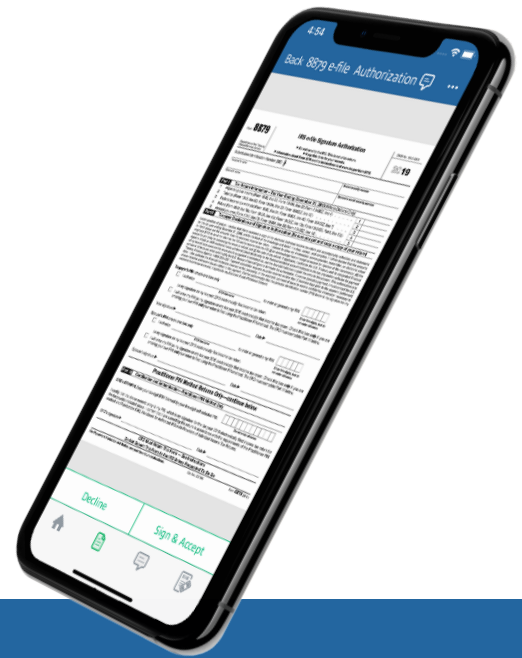
Browse your PC, Mac, tablet, mobile phone, Google Drive and Dropbox to upload PDF files, Excel spreadsheets, Word documents and more.



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

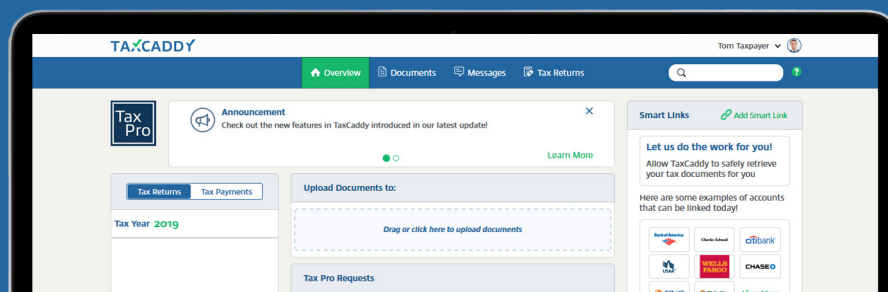
Trusted by some of the largest CPA firms in the world



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

Security of your data is our highest priority. As a TaxCaddy user, you will benefit from best-in-class technology, data centers, and infrastructure to meet the strict requirements of the most security-sensitive CPA firms in the world.

Infrastructure

TaxCaddy is built with layers of protection across a secure, reliable infrastructure. TaxCaddy leverages the Microsoft Azure cloud to ensure data security through encrypted communications, threat management, and threat mitigation practices, including regular penetration testing. TaxCaddy uses Amazon Web Services for secure, reliable storage. Your documents and data are encrypted in transit and at rest using Amazon's best-in-class Secure Socket Layer and Server-Side Encryption technologies.

Testing and Validation

TaxCaddy has been audited, tested, and validated by C-Level Security, LLC. C-Level Security is an independent, security-focused consulting firm employing leaders in the industry. TaxCaddy was found to enforce security controls to support a secure processing solution. The C-Level security attestation can be downloaded at taxcaddy.com. Additionally, TaxCaddy is used by two of the largest CPA firms in the world, and it's been through their rigorous security testing and validation.

SOC 2 Audit

SurePrep, the developer of TaxCaddy, received a SOC 2 Type 1, an independent service auditor's report on controls relevant to security, availability, confidentiality, and processing integrity set forth by the AICPA Trust Services Criteria.

Smart Links

Credentials for your Smart Links accounts are encrypted from the moment you enter them, so nobody can ever see or steal your data as it is transmitted to or from your account. No matter what device you use, from your desktop browser to your mobile phone, your data is always sent using 256-bit Secure Socket Layer encryption.

Your tax documents are delivered directly to your TaxCaddy account—no other service gets access to your documents, nor are they stored anywhere else. If you choose to delete any of the documents in your TaxCaddy account, those documents are permanently deleted—you maintain full control of your tax documents. You can delete any (or all) of your Smart Links any time you want. When you delete a Smart Link, your encrypted username and password information is deleted immediately.

Passwords and Two-Factor Authentication

To help keep your TaxCaddy account safe, the system requires a strong password that includes a number, a special character, both uppercase and lowercase letters, and a minimum of 8 characters.

TaxCaddy uses two-factor authentication to help keep your account secure by prompting you to enter your password and a unique, one-time verification code each time you log in. Although you can select "Don't ask me for verification again on this computer," we recommend you always keep the two-factor authentication enabled on all devices.

We regularly review and update security policies; provide security training; perform application and network security testing, including penetration testing; monitor compliance with security policies; and conduct internal and external risk assessments.