

## TaxCaddy vs. CCH My1040Data

Feature	TaxCaddy	CCH My1040Data
Taxpayers can gather and upload documents year-round	+	-
Integrated e-signature <sup>[1]</sup>	+	-
Taxpayer iPhone and Android apps	+	-
Taxpayer can upload documents	Photo-scan, automated document retrieval, or browse and upload	Browse and upload
Automated document retrieval <sup>[2]</sup>	+	-
Taxpayer owns the account <sup>[3]</sup>	+	-
Customizable questionnaire	+	-
Tax professional can upload documents (e.g. K-1s)	+	-
Tax return review and delivery	+	-
Documents feed directly to scan-and-populate	+	-
Configurable for multi-office	+	-
RESTful API available	+	-

1. TaxCaddy includes two types of e-signatures: simple e-signature for documents like engagement letters and e-signature with ID verification for documents like form 8879.
2. TaxCaddy links with over 300 financial institutions and payroll service providers to automatically retrieve documents the day they are issued (e.g. W-2s, 1099s, 1098s, etc.).
3. TaxCaddy maximizes adoption by giving taxpayers ownership of their accounts. Unlike portals, TaxCaddy is a long-term document storage solution for taxpayers.