











TaxCaddy vs. CCH My1040Data

Feature	TaxCaddy	CCH My1040Data
Taxpayers can gather and upload documents year-round	+	-
Integrated e-signature ^[1]	+	-
Taxpayer iPhone and Android apps	+	-
Taxpayer can upload documents	Photoscan, automated document retrieval, or browse and upload	Browse and upload
Automated document retrieval ^[2]	+	-
Taxpayer owns the account ^[3]	+	-
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	+	-
Integrated with SafeSend Returns™	+	-
Client Invoicing	+	-

Feature	TaxCaddy	CCH My1040Data
Convenient Estimated Payment Vouchers		
Offline Clients ^[4]		
CPA Practice Advisor Technology Innovation Award Finalist 2017		
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K2 Quality Award Winner - Best Mobile Strategy		

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.
4. TaxCaddy's Offline Clients feature ensures a consistent workflow for all clients (both active TaxCaddy users and non-users).

What are taxpayers saying?

View customer quotes at sureprep.com

TAXCADDY CUSTOMER SATISFACTION RATING

A user of TaxCaddy would be very likely to recommend for this reason:

“ I found it easy to use and built in a way to ensure I was collecting and sending all the data required. Forced all documents to be scanned and organized... Very nice..

Source: A user of TaxCaddy

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 TAXCADDY

 TechValidate

Based on a response of 10 to the question "On a scale of 0-10, how likely would you be to recommend TaxCaddy?"

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