SurePrep®

Part of Thomson Reuters

TaxCaddy vs. CCH Axcess™ Client Collaboration

Note: Chart based upon publicly available product information as of 9/6/2024.

Features & Benefits	TaxCaddy	CCH Axcess™ Client Collaboration
Taxpayer iOS/Android mobile phone & tablet apps	✔	✔
Taxpayer can photoscan & upload docs	✔	✔
Tax professional iOS/Android mobile phone & tablet apps	✔	✔
Supports fillable PDFs	✔	✖
One-click delivery for tax returns, vouchers, e-file authorizations	✔	✖
Taxpayer can store documents indefinitely	✔	✖
Documents can be flagged for inclusion/ exclusion in tax workpapers	✔	✔
E-signatures for any document type	✔	✖
Documents can be automatically retrieved & categorized	✔	✖
Customizable firm logo	✔	✔
Customizable firm colors	✔	✖
Built-in invoicing & payments	✔	✔ *
Taxpayers can make payments to Fed/State/Local tax authorities	✔	✖
Documents can be uploaded for taxpayer review	✔	✔

Features & Benefits	TaxCaddy	CCH Axcess™ Client Collaboration
RESTful API available	✔️	❌
Integrates with SafeSend Returns	✔️	❌
Integrates with GoSystem Tax RS, Lacerte, UltraTax CS	✔️	❌
Integrates with CCH Axcess™ Tax	✔️	✔️
One-on-one messaging with clients	✔️	✔️ *
Document-linked message threads	✔️	❌
Flexible status indicators	✔️	✔️
Taxpayers can keep their account forever	✔️	❌
Tax professional can continue to add questions to questionnaire after it is sent to taxpayers	✔️	❌
Taxpayer can give financial advisor and/or assistant access to account	✔️	❌
Accessibility/Color Vision Deficiency/Dark Mode	✔️	❌

*Available only on browser, not mobile app.

"It was so easy to take photos of all of the documents to send on. TaxCaddy saved me a tremendous amount of time. Made tax season less stressful!"

—Kevin Frank, TaxCaddy user

sureprep.com   800.805.8582

SurePrep®
Part of Thomson Reuters