

TaxCaddy vs. CCH Client Collaboration

Feature	TaxCaddy	CCH Client Collaboration*
Taxpayer iOS/Android mobile phone & tablet apps	✓	✗
Taxpayer can photostan & upload docs ^[1]	✓	✗
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 ^[2]	✓	✗
Documents can be flagged for inclusion/exclusion in the tax workpapers	✓	✗
Documents include visual indicators to show whether they've been added to the binder	✓	✗
E-Signatures for any document type ^[3]	✓	✗
Documents can be automatically retrieved and categorized ^[4]	✓	✗
Custom branding to match your firm's style	✓	✗
Taxpayers can make payments to Fed/State/Local tax authorities	✓	✗
Documents can be uploaded for taxpayer review	✓	✗
Integrated with SafeSend Returns	✓	✗

Feature	TaxCaddy	CCH Client Collaboration*
RESTful API available	✓	✗
Integrates with CCH Axcess Tax, GoSystem Tax RS, Lacerte, UltraTax CS	✓	✗
Collaborative, document-linked message threads ^[5]	✓	✗
Flexible status indicators (Done Uploading) ^[6]	✓	✗
Tax professional can continue to add questions to questionnaire after it is sent to taxpayers	✓	✗
Taxpayers can keep their account forever ^[2]	✓	✗
Taxpayer can give financial advisor and/or assistant access to the account	✓	✗
Accessibility/Color Vision Deficiency/Dark Mode	✓	✗

“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

View taxpayer quotes at bit.ly/taxpayerquotes

1. Using the TaxCaddy app for iOS or Android, taxpayers can photoscan and securely upload paper documents as soon as they receive them.
2. TaxCaddy maximizes taxpayer adoption by providing a permanent storage solution (CCH Client Collaboration stores documents for two years) and by giving taxpayers ownership of their accounts.
3. TaxCaddy includes two types of e-signatures: simple e-signatures for documents like engagement letters and Knowledge-Based Authentication (KBA) e-signatures for Form 8879.
4. TaxCaddy links with leading financial institutions to automatically retrieve documents the day they are issued. These documents are automatically categorized and removed from the document request list.
5. Both taxpayers and tax professionals can link messages to documents for context and easy navigation. CCH Client Collaboration messages are not linked to documents.
6. After using the "Done Uploading" feature, taxpayers still have the ability to add documents and update their questionnaire, if necessary.

* Based on current public documentation

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