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documents and data.

Sep. 20, 2010

ANDOVER, MA – Copanion, Inc., the leader in paperless tax workflow technology, recently announced the launch of the newest addition to the GruntWorx family of products—GruntWorx Gather. Gather facilitates seamless and secure electronic transfer of client tax data from the client to the tax practitioner. The ability to automatically retrieve client tax information puts the practitioner in control of the tax prep process—eliminating the bottleneck of waiting for clients to deliver source data. GruntWorx Gather is the first data retrieval solution of its kind for the tax and accounting profession.

“Firms are always seeking ways to improve the efficiency of their tax process. In a recent survey, 72% of professionals said that the biggest obstacle in their tax workflow is waiting for clients to deliver documentation,” stated Ed Jennings, Copanion CEO. “We took this common issue and worked to create a solution. GruntWorx Gather eliminates the bottleneck by allowing the practitioner to drive the process from the beginning.”

Copanion’s complete line of integrated modules supports each step of the tax preparation process:

1. GruntWorx Gather automatically retrieves posted 1099 consolidated brokerage statements as they become available and delivers them directly to the firm’s GruntWorx account for processing.
2. GruntWorx Organize logically organizes and bookmarks the client’s tax data within a single PDF file.
3. GruntWorx Populate extracts data from the bookmarked PDF and automatically populates the client’s tax return.

The addition of Gather to the GruntWorx family represents an all-inclusive

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upload capabilities, Gather provides a complete solution for efficient client data collection.

“The value of GruntWorx Gather cannot be understated,” said Jennings.

“By automating the delivery of client tax data, firms will realize immense time savings by collecting data early in the season and eliminating late-arriving amended documents. Clients see value because they no longer have to hassle with mailing, faxing, or emailing source data.” GruntWorx Gather is available for filing season 2010. It is the only source document retrieval system available to the tax and accounting profession.

### **About Copanion**

Copanion is the leader in paperless tax workflow technology—providing a comprehensive and integrated family of web-based products that automate client tax document retrieval, organization, data entry, and review. The GruntWorx family of products has been in use for multiple tax seasons by thousands of accounting professionals—from sole practitioners to those working in large regional firms and the Big 4. GruntWorx is the product of choice for tax professionals—with

more than 4 million processed tax forms this past tax season. To date, Copanion products have earned multiple accolades, including back-to-back Technology Innovation

Awards (2008 & 2009) and a Readers' Choice Award from The CPA Technology Advisor, Accounting Today's Top 100 Ones to Watch, and a K2 Annual Quality Award. For more information about Copanion, visit [Copanion.com](http://Copanion.com).

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