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inefficiency of paper organizers. The questionnaire can be completed from any connected device. Documents like engagement letters and e-file authorizations can be e-signed. Your clients can use the TaxCaddy app for iPhone and Android to photo-scan paper documents and upload them as soon as they are received.

More than 300 banks, brokerages and payroll service providers can be linked to automatically retrieve 1098s, 1099s and W-2s as soon as they're issued. Because the documents are available to you immediately, you can start the return sooner than ever before.

Once your client provides the necessary documents through TaxCaddy they can be sent to 1040SCAN or our outsource service with the click of a button. When the return is done your client can review it and e-sign the 8879, all from TaxCaddy.

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