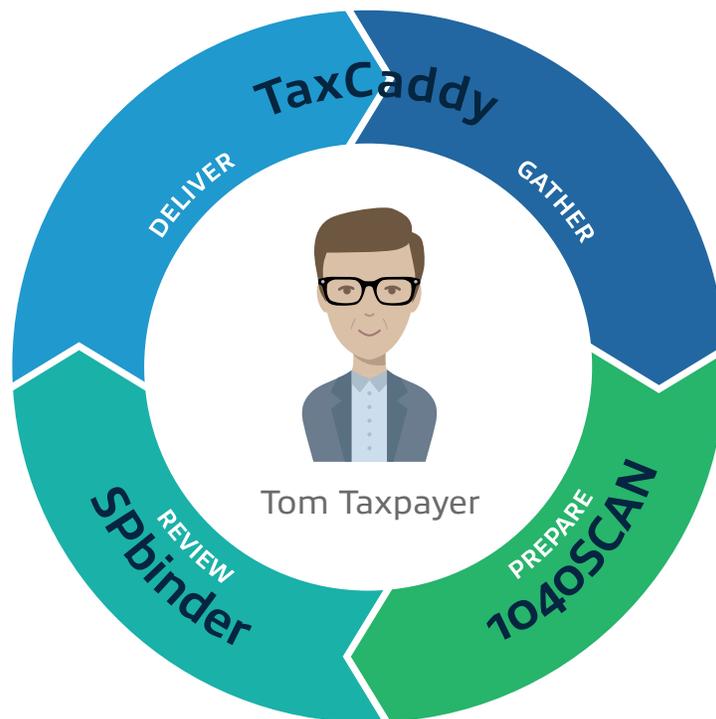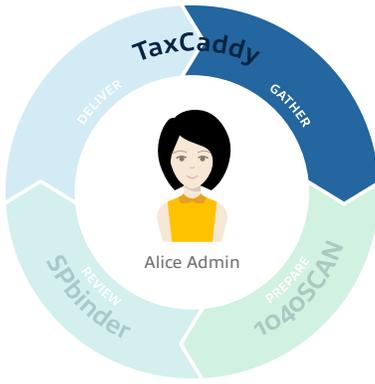# Introducing the
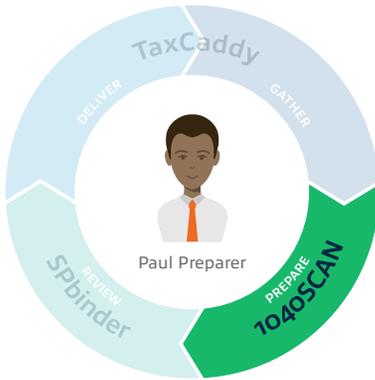# **SurePrep Tax Process**

Meet **Tom Taxpayer**

The SurePrep tax process starts and ends with the taxpayer. Tom uses TaxCaddy to gather his tax documents year-round. The TaxCaddy app for iPhone/Android and automated document retrieval simplify tax time like never before. TaxCaddy's e-signature with ID verification and electronic questionnaire mean no more office visits and no more paper organizers. Tom loves the technology his tax professional provides.
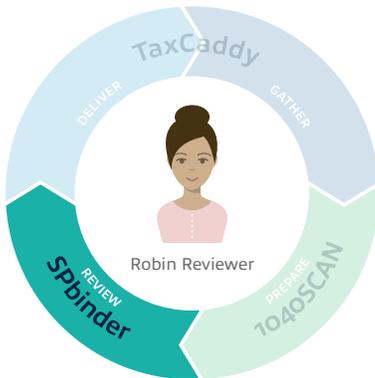
1. Gather with TaxCaddy

Alice no longer needs to print and mail organizers or receive and scan source documents. Alice sends Tom Taxpayer the engagement letter, a tailored questionnaire and document request list through TaxCaddy. Tom can respond from any device, including the TaxCaddy app for iPhone and Android.
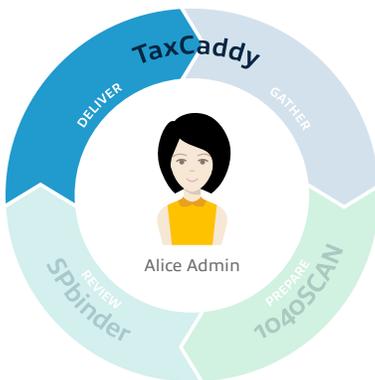
2. Prepare with 1040SCAN

Since Paul gets access to Tom's questionnaire answers and documents immediately, he can start the return sooner than ever before. And because Paul uses 1040SCAN, he finishes the return faster as well. 1040SCAN automates the processing of 4 – 7 times as many documents as its competitors, including patented auto-verification for native PDFs. Once Paul is done preparing the return, it is sent to Robin for review.

3. Review with SPbinder

Robin loves the time saved by SPbinder's easy-to-review workpapers. Standardized workpaper organization and tickmarking tools minimize review time. Hyperlinked cross-references make getting to the source of any number a breeze. Open items and review notes facilitate collaboration between the engagement team. Workpaper sign-offs make it easy for Robin to know where she left off or what's changed since she last reviewed.

4. Deliver with TaxCaddy

When the return is done, Alice simply uploads the PDF of the return, 8879, and invoice to TaxCaddy. Tom Taxpayer reviews his return, electronically signs the e-file authorization, pays his tax professional's invoice, and pays his federal and state tax payments with supreme ease and convenience. **TaxCaddy is now integrated with SafeSend Returns™!**

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