TAX TRANSFORMATION SUMMIT
NOVEMBER 3-5, 2019

What do you need to know for the Upcoming Busy Season

- Peter Miele, VP of Sales
- Sarika Arora, Director of Product

Peter Miele

Peter Miele is the Vice President of Sales for SurePrep, LLC and is responsible for leading sales and business development activities across the company. Peter combines comprehensive tax & accounting, paperless workflow and sales knowledge, along with the ability to communicate effectively across all levels of customer management.

Before joining SurePrep in April 2006, Peter was a Tax Manager with the accounting firm Deloitte, where he gained nearly a decade of tax and accounting experience. Peter earned a bachelor’s degree in accounting from Seton Hall University in 1998.

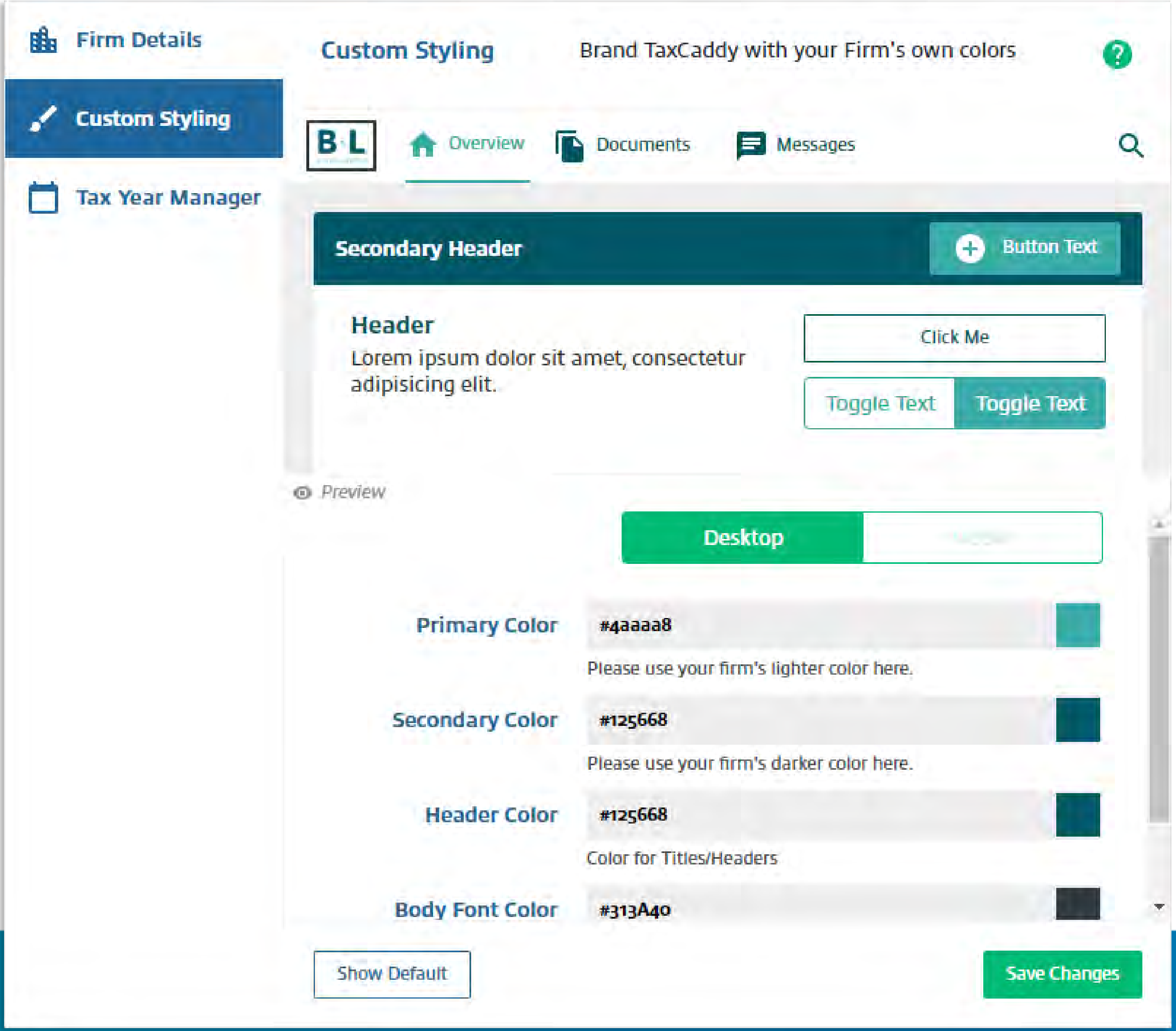
Sarika Arora

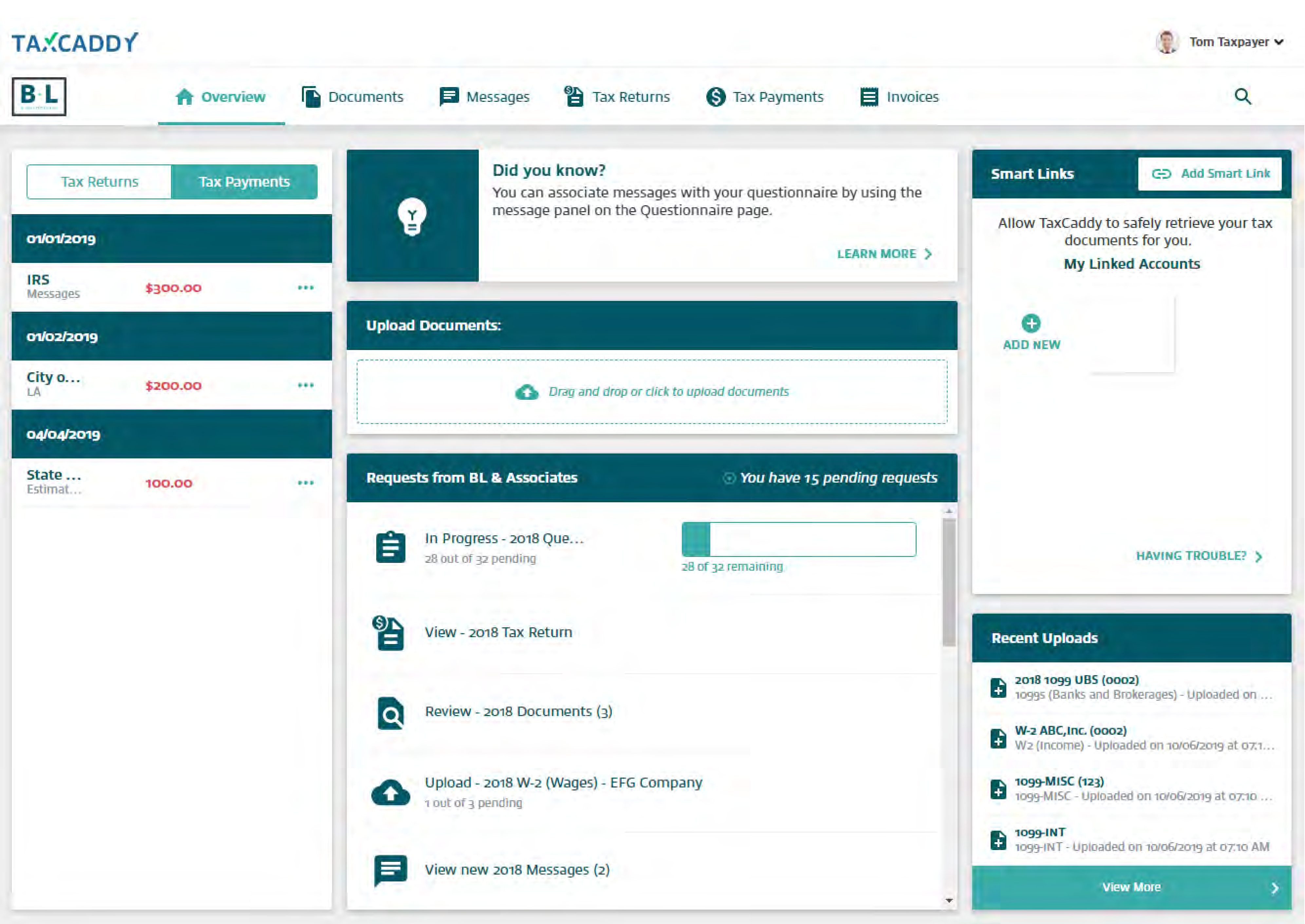
Sarika Arora is the Director of Product for SurePrep, LLC.

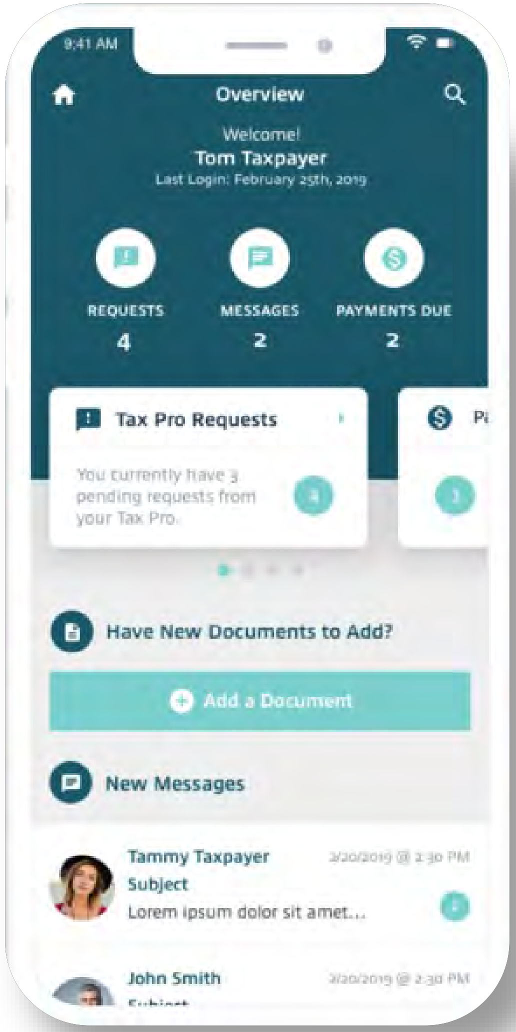
As the head of the Product Department, Sarika is responsible for articulating the product vision and orchestrating the product team to achieve this common goal. Sarika focuses on defining product strategy to meet our client needs, improve their experience and maximize their satisfaction.

Sarika started her career with SurePrep (India) in 2004 preparing U.S. tax returns. She joined SurePrep, LLC in 2009 as a Client Success Manager. Sarika earned her Master’s in Accounting and Taxation from the University of Mumbai in 2005.

Custom Branding




TAXCADDY
Tom Taxpayer
B·L
Overview
Documents
Messages
Tax Returns
Tax Payments
Invoices
Tax Returns
Tax Payments
01/01/2019
IRS
Messages
$300.00
01/02/2019
City o...
LA
$200.00
04/04/2019
State ...
Estimat...
100.00
Did you know?
You can associate messages with your questionnaire by using the message panel on the Questionnaire page.
LEARN MORE
Upload Documents:
Drag and drop or click to upload documents
Requests from BL & Associates
You have 15 pending requests
In Progress - 2018 Que...
28 out of 32 pending
28 of 32 remaining
View - 2018 Tax Return
Review - 2018 Documents (3)
Upload - 2018 W-2 (Wages) - EFG Company
1 out of 3 pending
View new 2018 Messages (2)
Smart Links
Add Smart Link
Allow TaxCaddy to safely retrieve your tax documents for you.
My Linked Accounts
ADD NEW
HAVING TROUBLE?
Recent Uploads
2018 1099 UBS (0002)
1099s (Banks and Brokerages) - Uploaded on ...
W-2 ABC,Inc. (0002)
W2 (Income) - Uploaded on 10/06/2019 at 07:1...
1099-MISC (123)
1099-MISC - Uploaded on 10/06/2019 at 07:10 ...
1099-INT
1099-INT - Uploaded on 10/06/2019 at 07:10 AM
View More


9:41 AM
Overview
Welcome!
Tom Taxpayer
Last Login: February 25th, 2019
REQUESTS
4
MESSAGES
2
PAYMENTS DUE
2
Tax Pro Requests
You currently have 3 pending requests from your Tax Pro.
Have New Documents to Add?
Add a Document
New Messages
Tammy Taxpayer
Subject
Lorem ipsum dolor sit amet...
John Smith

TAXCADDY

Tom Taxpayer

BKD LLP CPAs & Advisors

Overview | Documents | Messages | Tax Returns | Tax Payments | Invoices

Tax Returns | Tax Payments

Tax Year 2018 2019

You don't have a return yet.

Sit tight for now and let your tax professional work their magic.

Announcement

TaxCaddy 2.0 is here! You can now see all your tasks under Tax Pro Requests, manage other users with their permission, and more. Learn more.

LEARN MORE ›

Upload Documents:

Drag and drop or click to upload documents

Requests from BL & Co.,133

You have 0 pending requests

There are currently no requests from your tax professional

You may begin uploading documents to tax years using the Upload Documents section above

Smart Links

Add Smart Link

Allow TaxCaddy to safely retrieve your tax documents for you.

Here are some examples of accounts that can be linked today!

Bank of America | charles SCHWAB | citibank

Capital One | US Bank | VIEW MORE

We use industry-standard data encryption to ensure the safety of your personal information.

LEARN MORE ›

Recent Uploads

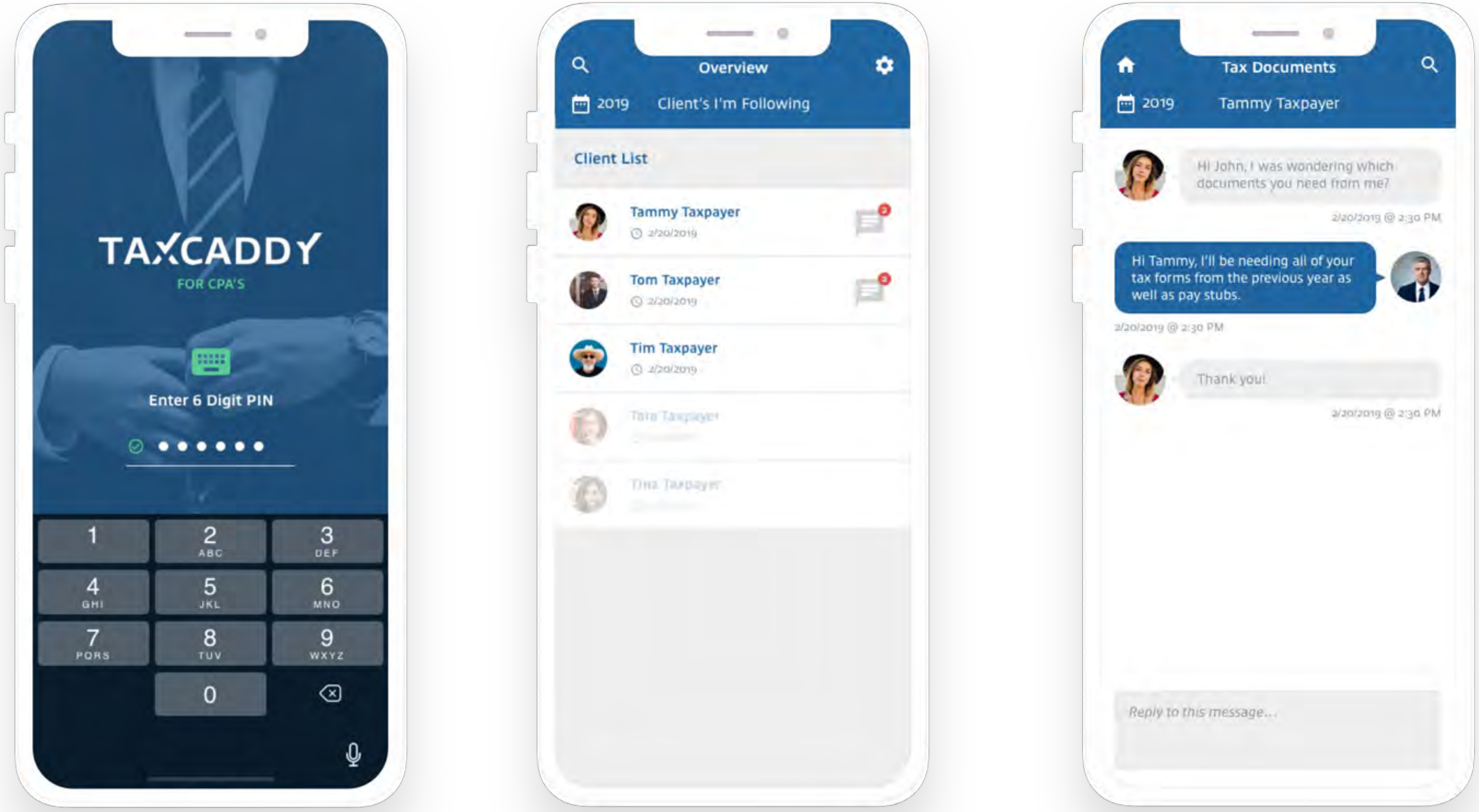
DHG_Presentation

W-2 (Wages) - Uploaded on 06/27/2019 at 10:0...

View More ›

Tax Professional Mobile App

View and respond to taxpayer messages in TaxCaddy from your mobile device.



Firm ID: BDO John Smith Help Center Tax Caddy

Overview Administrative

Profile Info

Notifications

Mobile Settings

Mobile Messaging App

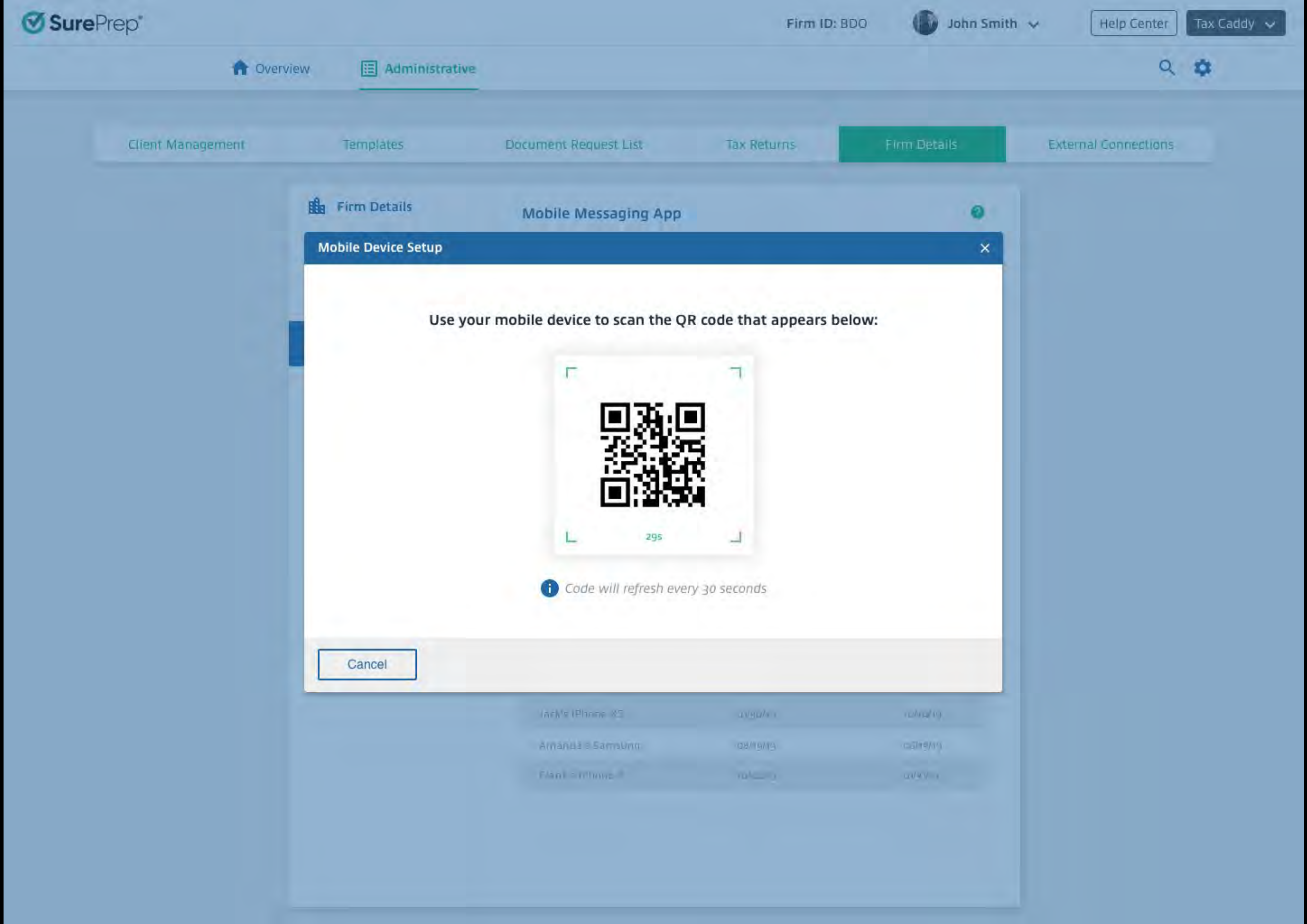
Set up a mobile device:

Click the button below to begin setting up a mobile device. You will be provided with a QR code, and will then scan the code using your mobile device.

Initiate Setup

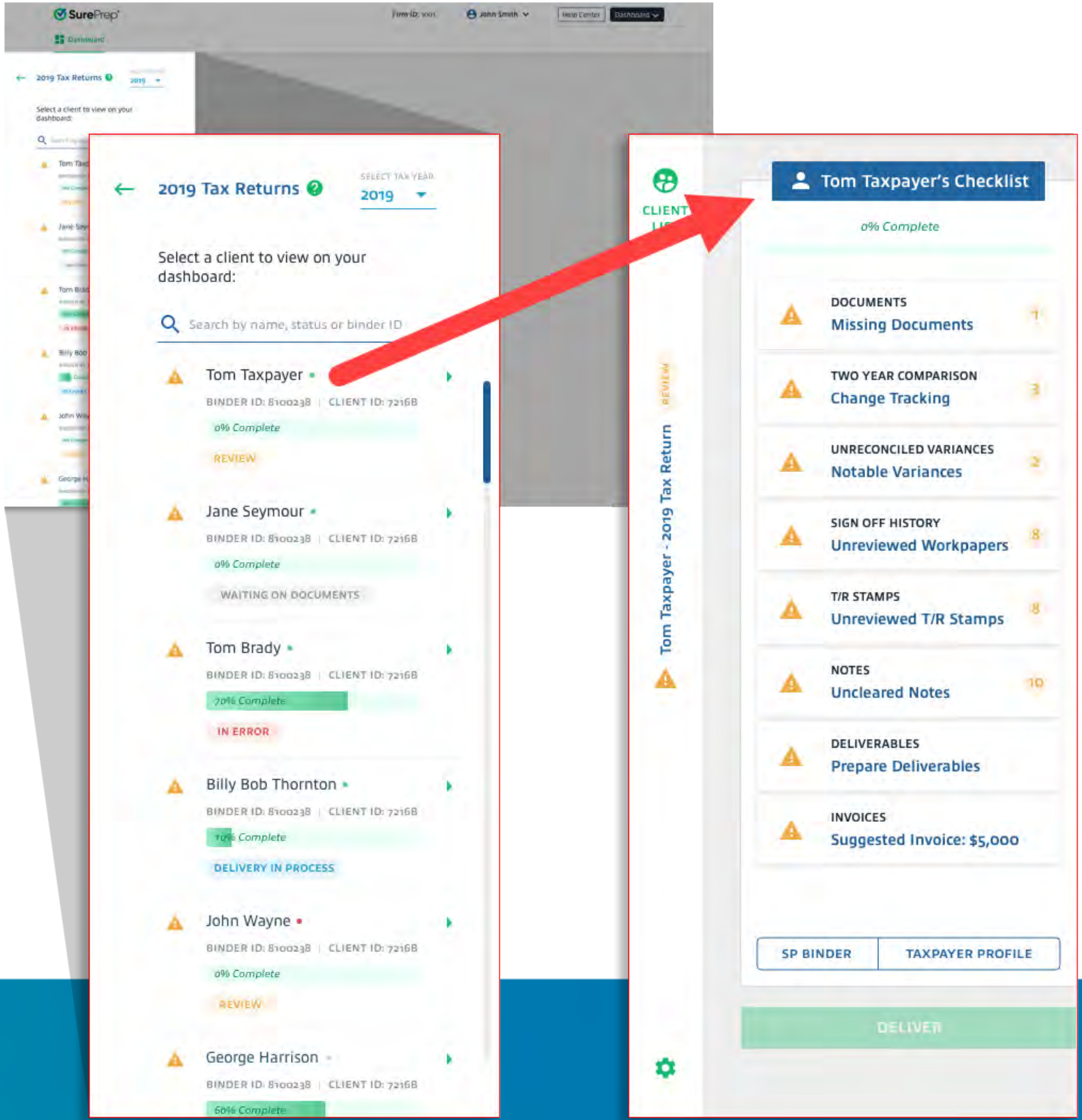
Connected devices:

Device Name	Connection Date	Last Activity	
John's iPhone X	12/12/19	01/13/19	Disconnect
John's iPad	02/13/19	03/25/19	Disconnect
John's Android	11/14/19	02/05/19	Disconnect


SurePrep
Firm ID: BDO
John Smith
Help Center
Tax Caddy
Overview
Administrative
Client Management
Templates
Document Request List
Tax Returns
Firm Details
External Connections
Firm Details
Mobile Messaging App
Mobile Device Setup
Use your mobile device to scan the QR code that appears below:
29s
Code will refresh every 30 seconds
Cancel

Reviewer Dashboard

The Reviewer Dashboard will serve as a high level risk analysis and review tool to sign off and file tax returns more efficiently



SurePrep®

Firm ID: 1001

John Smith

Help Center

Dashboard

Dashboard

CLIENT LIST

REVIEW

Tom Taxpayer - 2019 Tax Return

Tom Taxpayer's Checklist

0% Complete

DOCUMENTS
Missing Documents
1

TWO YEAR COMPARISON
Review Changes

DELIVERABLES
Prepare Deliverables

SPBINDER | TAXPAYER PROFILE

DELIVER

SurePrep

Firm ID: 1001

John Smith

Help Center

Dashboard

Dashboard

CLIENT LIST

REVIEW

Tom Taxpayer - 2019 Tax Return

Tom Taxpayer's Checklist

0% Complete

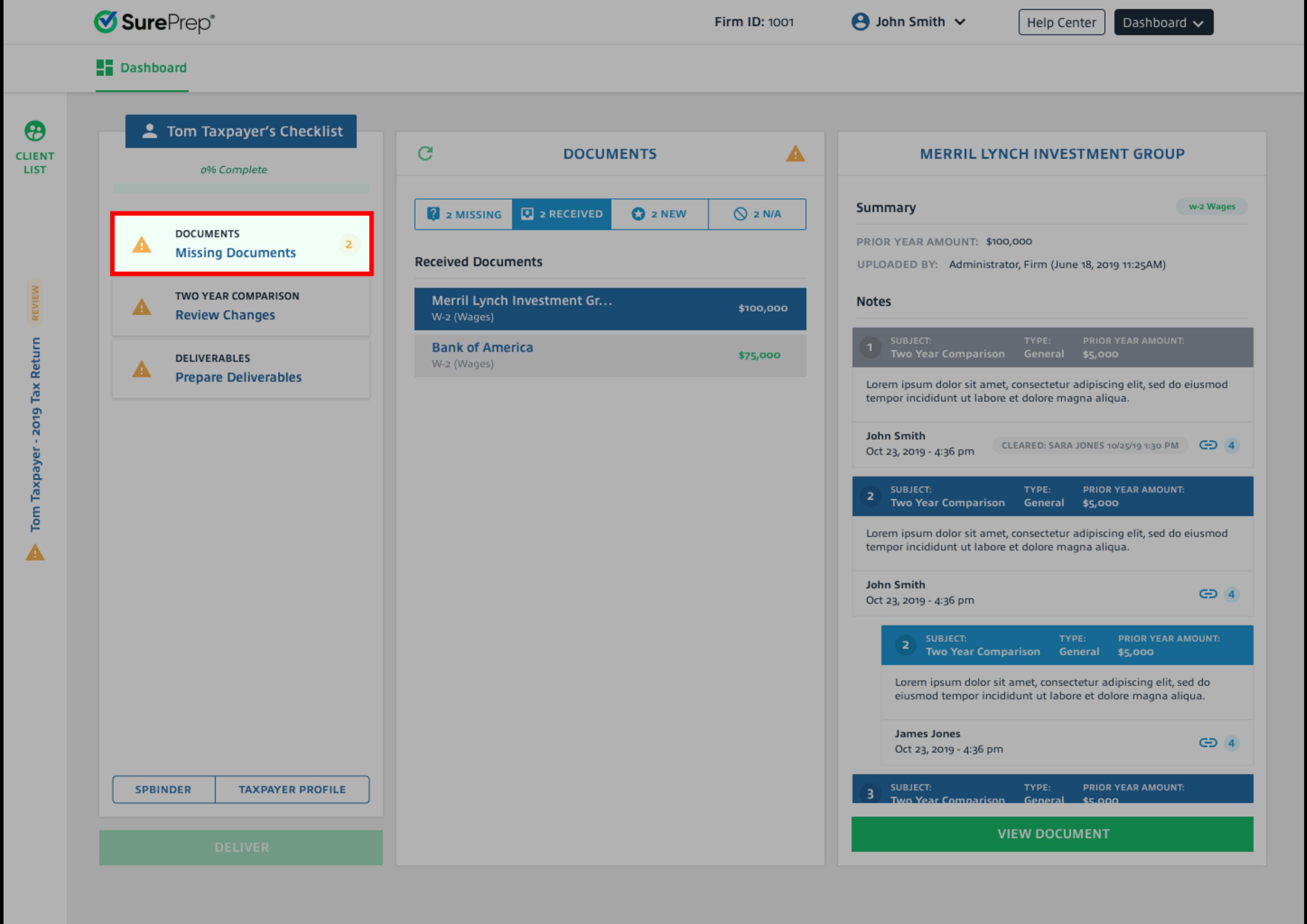
DOCUMENTS
Missing Documents 2

TWO YEAR COMPARISON
Review Changes

DELIVERABLES
Prepare Deliverables

SPBINDER | TAXPAYER PROFILE

DELIVER


SurePrep
Firm ID: 1001
John Smith
Help Center
Dashboard
Dashboard
CLIENT LIST
REVIEW
Tom Taxpayer - 2019 Tax Return
Tom Taxpayer's Checklist
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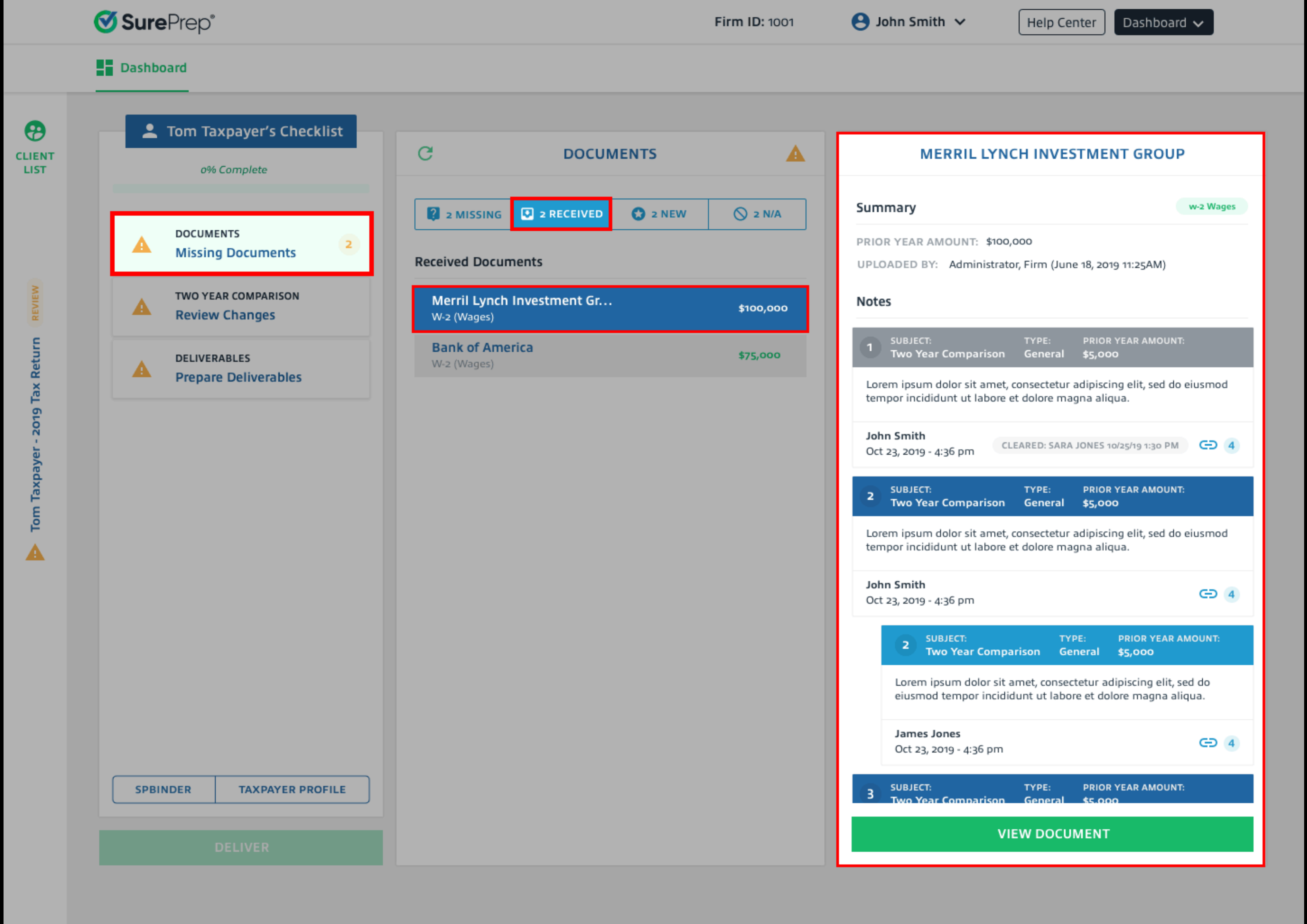
DOCUMENTS
Missing Documents
2
TWO YEAR COMPARISON
Review Changes
DELIVERABLES
Prepare Deliverables
SPBINDER
TAXPAYER PROFILE
DELIVER
DOCUMENTS
2 MISSING
2 RECEIVED
2 NEW
2 N/A
Received Documents
Merril Lynch Investment Gr...
W-2 (Wages)
$100,000
Bank of America
W-2 (Wages)
$75,000
MERRIL LYNCH INVESTMENT GROUP
Summary
W-2 Wages
PRIOR YEAR AMOUNT: $100,000
UPLOADED BY: Administrator, Firm (June 18, 2019 11:25AM)
Notes
1 SUBJECT: Two Year Comparison TYPE: General PRIOR YEAR AMOUNT: $5,000
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
John Smith
Oct 23, 2019 - 4:36 pm
CLEARED: SARA JONES 10/25/19 1:30 PM
4
2 SUBJECT: Two Year Comparison TYPE: General PRIOR YEAR AMOUNT: $5,000
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
John Smith
Oct 23, 2019 - 4:36 pm
4
2 SUBJECT: Two Year Comparison TYPE: General PRIOR YEAR AMOUNT: $5,000
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
James Jones
Oct 23, 2019 - 4:36 pm
4
3 SUBJECT: Two Year Comparison TYPE: General PRIOR YEAR AMOUNT: $5,000
VIEW DOCUMENT


SurePrep
Firm ID: 1001
John Smith
Help Center
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Dashboard
CLIENT LIST
REVIEW
Tom Taxpayer - 2019 Tax Return
Tom Taxpayer's Checklist
0% Complete
DOCUMENTS
Missing Documents
2
TWO YEAR COMPARISON
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Prepare Deliverables
SPBINDER
TAXPAYER PROFILE
DELIVER
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W-2 (Wages)
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CLEARED: SARA JONES 10/25/19 1:30 PM
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James Jones
Oct 23, 2019 - 4:36 pm
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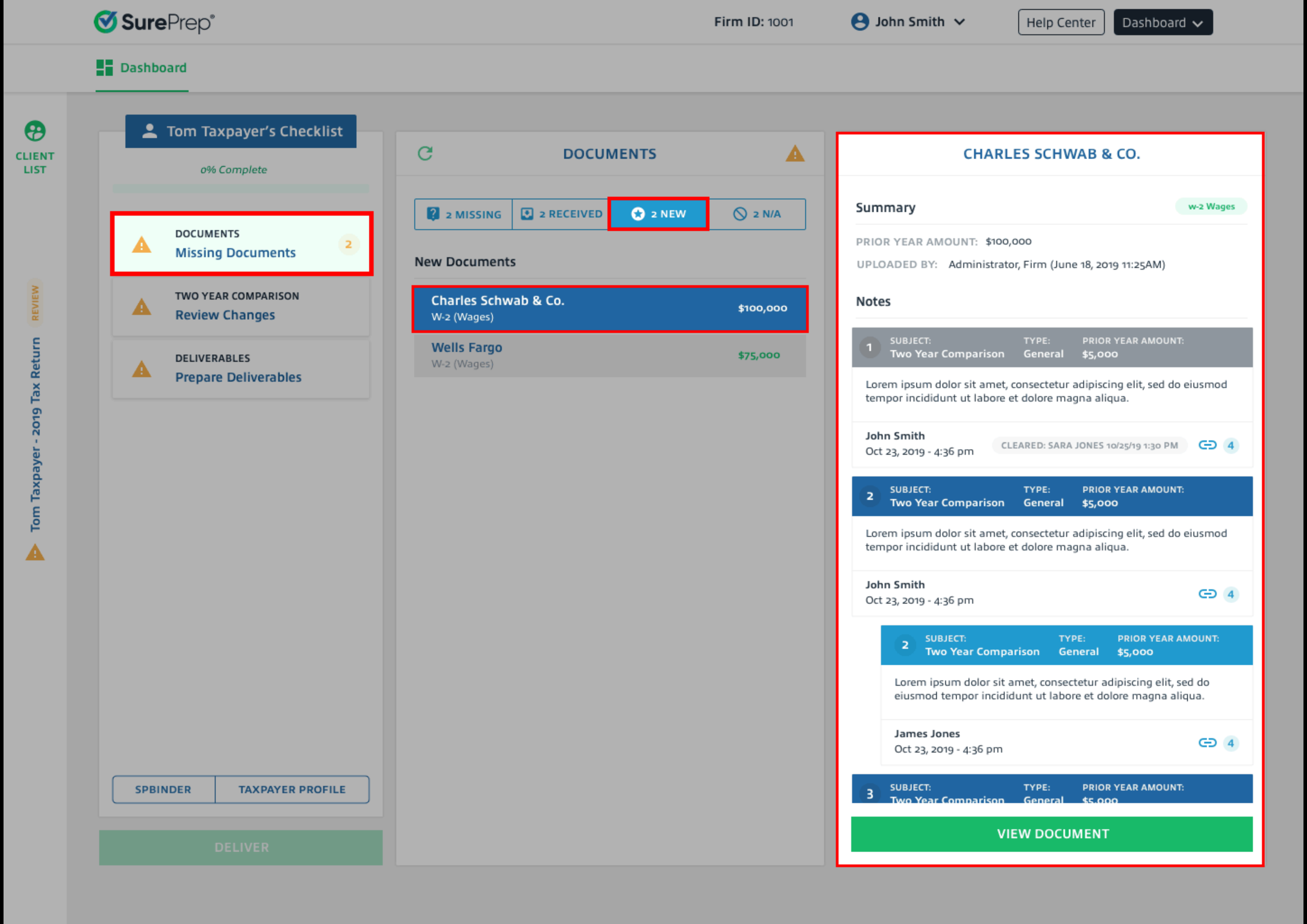
SUBJECT:
TYPE:
PRIOR YEAR AMOUNT:
VIEW DOCUMENT


SurePrep
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CLIENT LIST
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Tom Taxpayer - 2019 Tax Return
Tom Taxpayer's Checklist
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DOCUMENTS
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TWO YEAR COMPARISON
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DELIVERABLES
Prepare Deliverables
SPBINDER
TAXPAYER PROFILE
DELIVER
DOCUMENTS
2 MISSING
2 RECEIVED
2 NEW
2 N/A
New Documents
Charles Schwab & Co.
W-2 (Wages)
$100,000
Wells Fargo
W-2 (Wages)
$75,000
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James Jones
Oct 23, 2019 - 4:36 pm
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SUBJECT:
TYPE:
PRIOR YEAR AMOUNT:
VIEW DOCUMENT

SurePrep

Firm ID: 1001

John Smith

Help Center

Dashboard

Dashboard

CLIENT LIST

REVIEW

Tom Taxpayer - 2019 Tax Return

Tom Taxpayer's Checklist

0% Complete

DOCUMENTS
Missing Documents
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TWO YEAR COMPARISON
Review Changes

DELIVERABLES
Prepare Deliverables

SPBINDER

TAXPAYER PROFILE

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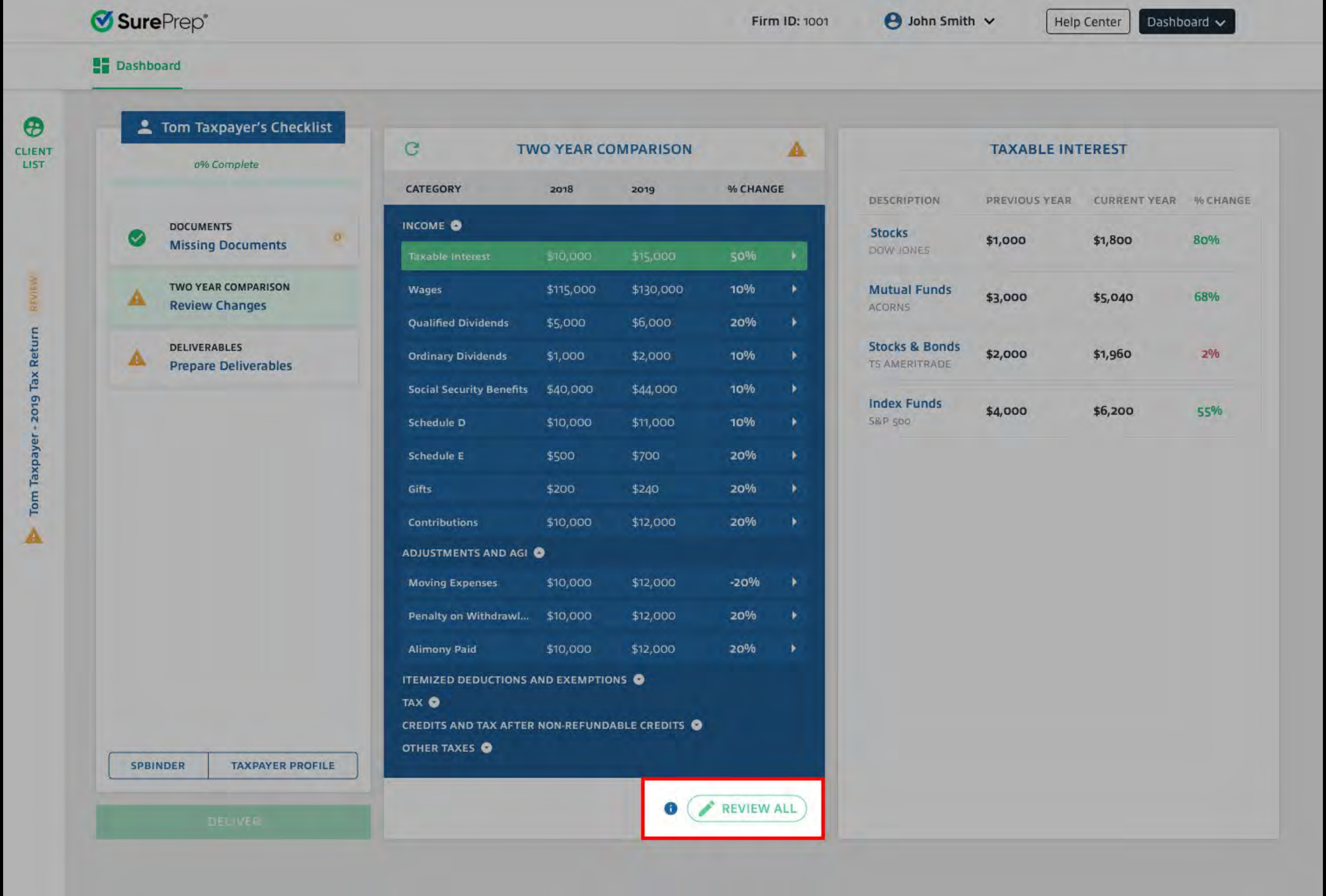

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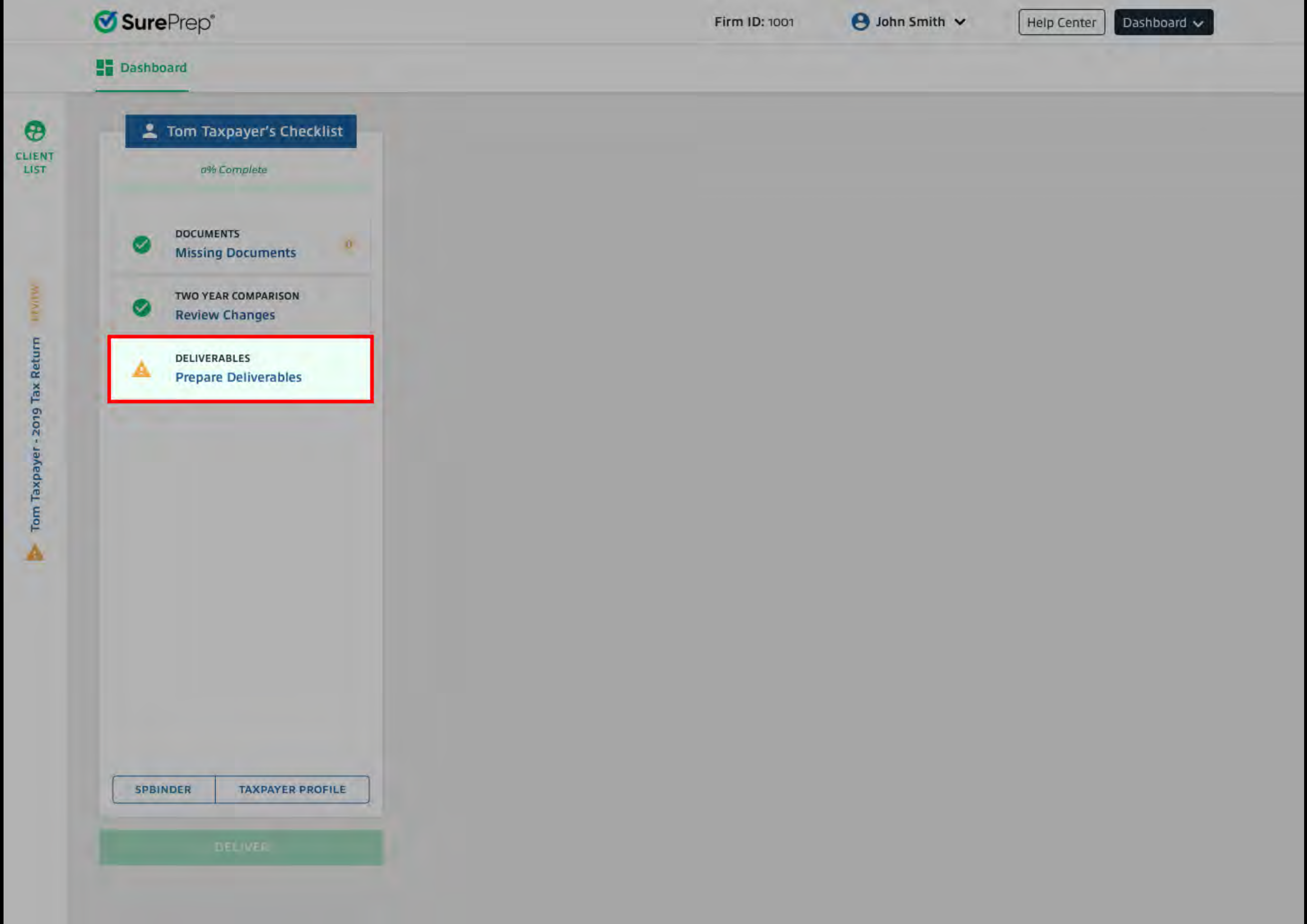
DELIVERABLES
Prepare Deliverables
SPBINDER
TAXPAYER PROFILE
DELIVER
TWO YEAR COMPARISON
CATEGORY 2018 2019 % CHANGE
INCOME
Taxable Interest $10,000 $15,000 50%
Wages $115,000 $130,000 10%
Qualified Dividends $5,000 $6,000 20%
Ordinary Dividends $1,000 $2,000 10%
Social Security Benefits $40,000 $44,000 10%
Schedule D $10,000 $11,000 10%
Schedule E $500 $700 20%
Gifts $200 $240 20%
Contributions $10,000 $12,000 20%
ADJUSTMENTS AND AGI
Moving Expenses $10,000 $12,000 -20%
Penalty on Withdrawl... $10,000 $12,000 20%
Alimony Paid $10,000 $12,000 20%
ITEMIZED DEDUCTIONS AND EXEMPTIONS
TAX
CREDITS AND TAX AFTER NON-REFUNDABLE CREDITS
OTHER TAXES
REVIEW ALL
TAXABLE INTEREST
DESCRIPTION PREVIOUS YEAR CURRENT YEAR % CHANGE
Stocks DOW JONES $1,000 $1,800 80%
Mutual Funds ACORNS $3,000 $5,040 68%
Stocks & Bonds TS AMERITRADE $2,000 $1,960 2%
Index Funds S&P 500 $4,000 $6,200 55%


SurePrep
Firm ID: 1001
John Smith
Help Center
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Dashboard
CLIENT LIST
Tom Taxpayer - 2019 Tax Return
Tom Taxpayer's Checklist
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DOCUMENTS
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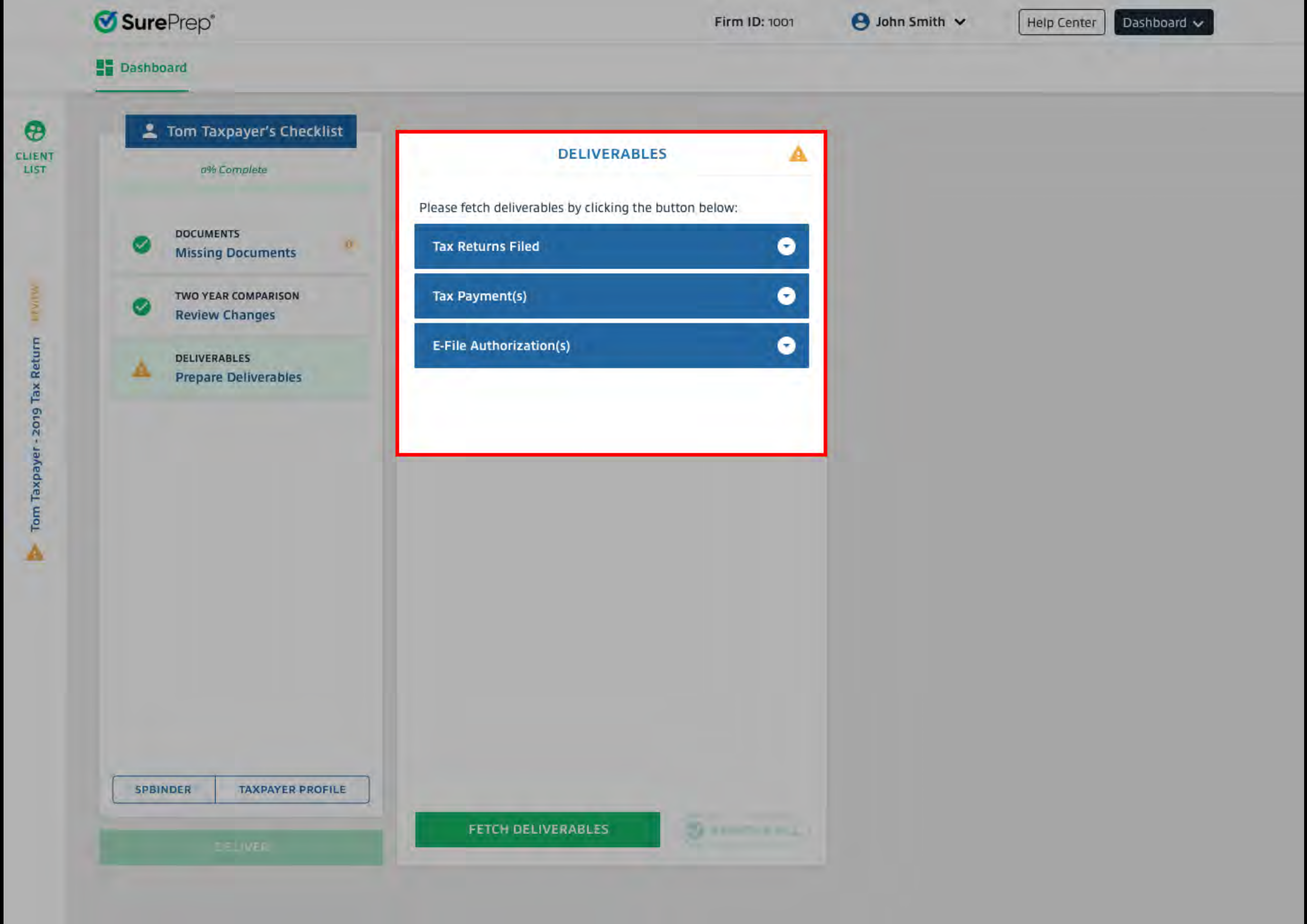
SPBINDER
TAXPAYER PROFILE
DELIVER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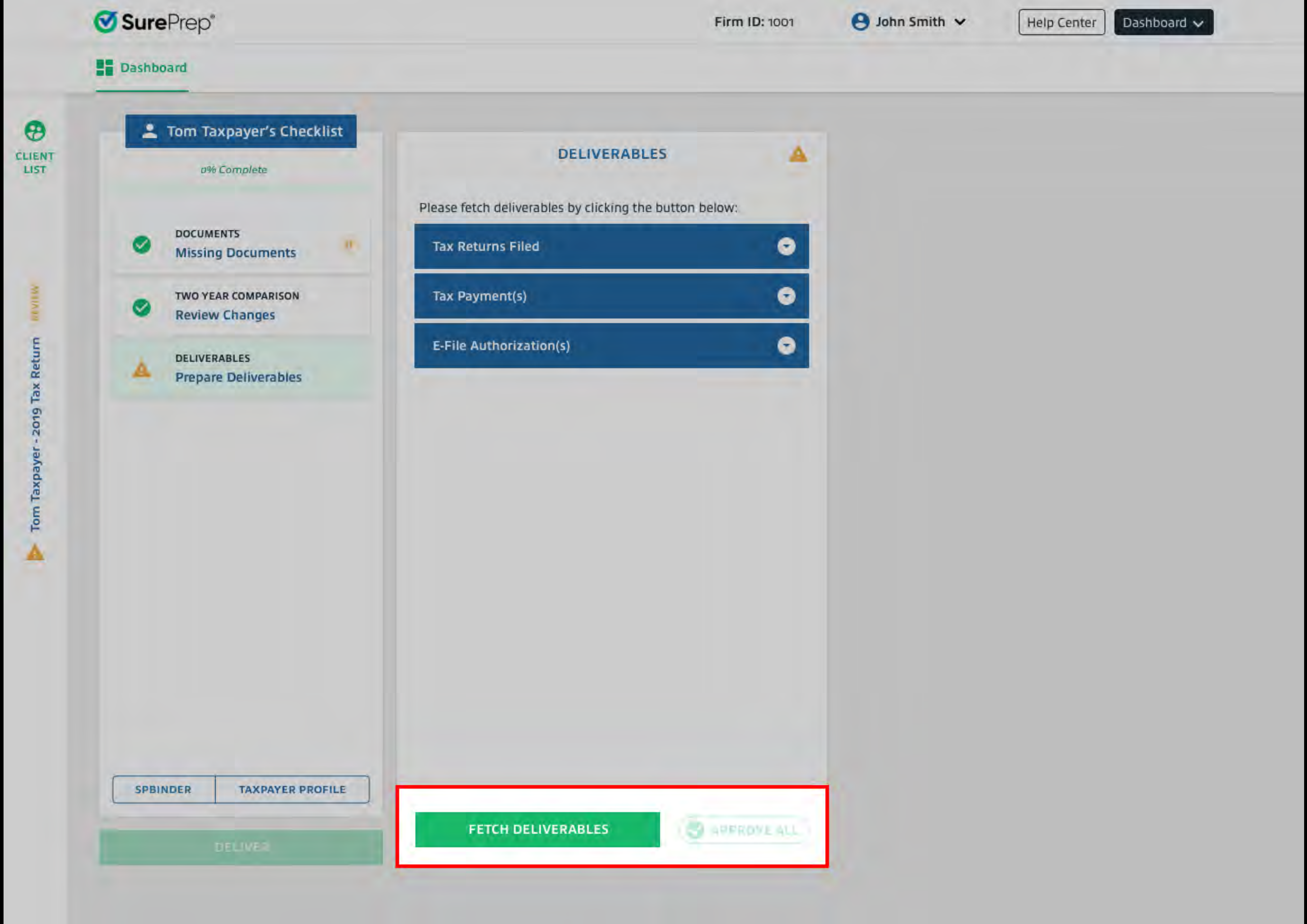
Review Changes
DELIVERABLES
Prepare Deliverables
Tom Taxpayer - 2019 Tax Return
SPBINDER
TAXPAYER PROFILE
DELIVER
DELIVERABLES
Please fetch deliverables by clicking the button below:
Tax Returns Filed
Tax Payment(s)
E-File Authorization(s)
FETCH DELIVERABLES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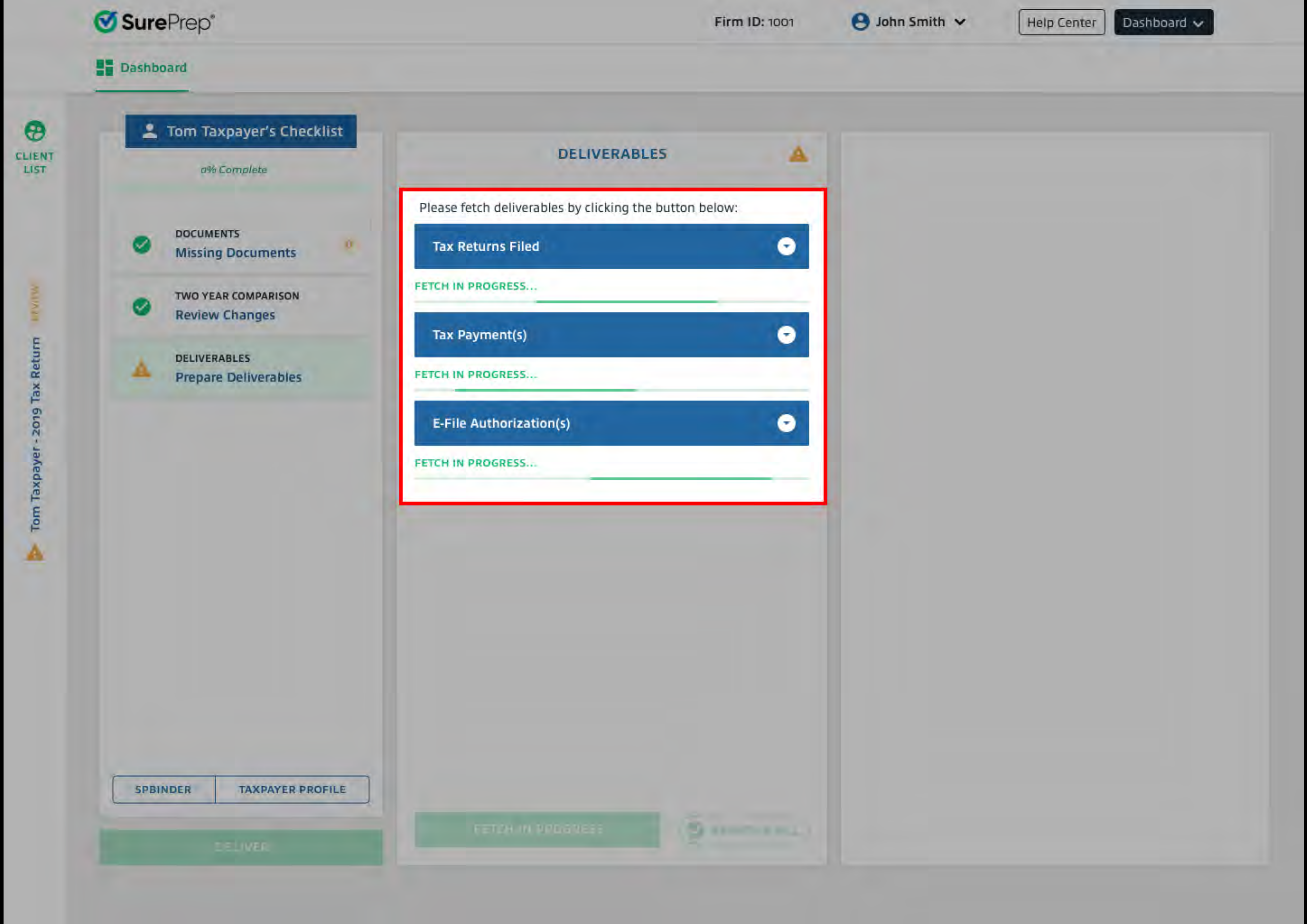
Missing Documents
TWO YEAR COMPARISON
Review Changes
DELIVERABLES
Prepare Deliverables
SPBINDER
TAXPAYER PROFILE
DELIVER
DELIVERABLES
Please fetch deliverables by clicking the button below:
Tax Returns Filed
Tax Payment(s)
E-File Authorization(s)
FETCH DELIVERABLES
APPROVE ALL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CLIENT LIST
Tom Taxpayer - 2019 Tax Return
Tom Taxpayer's Checklist
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DOCUMENTS
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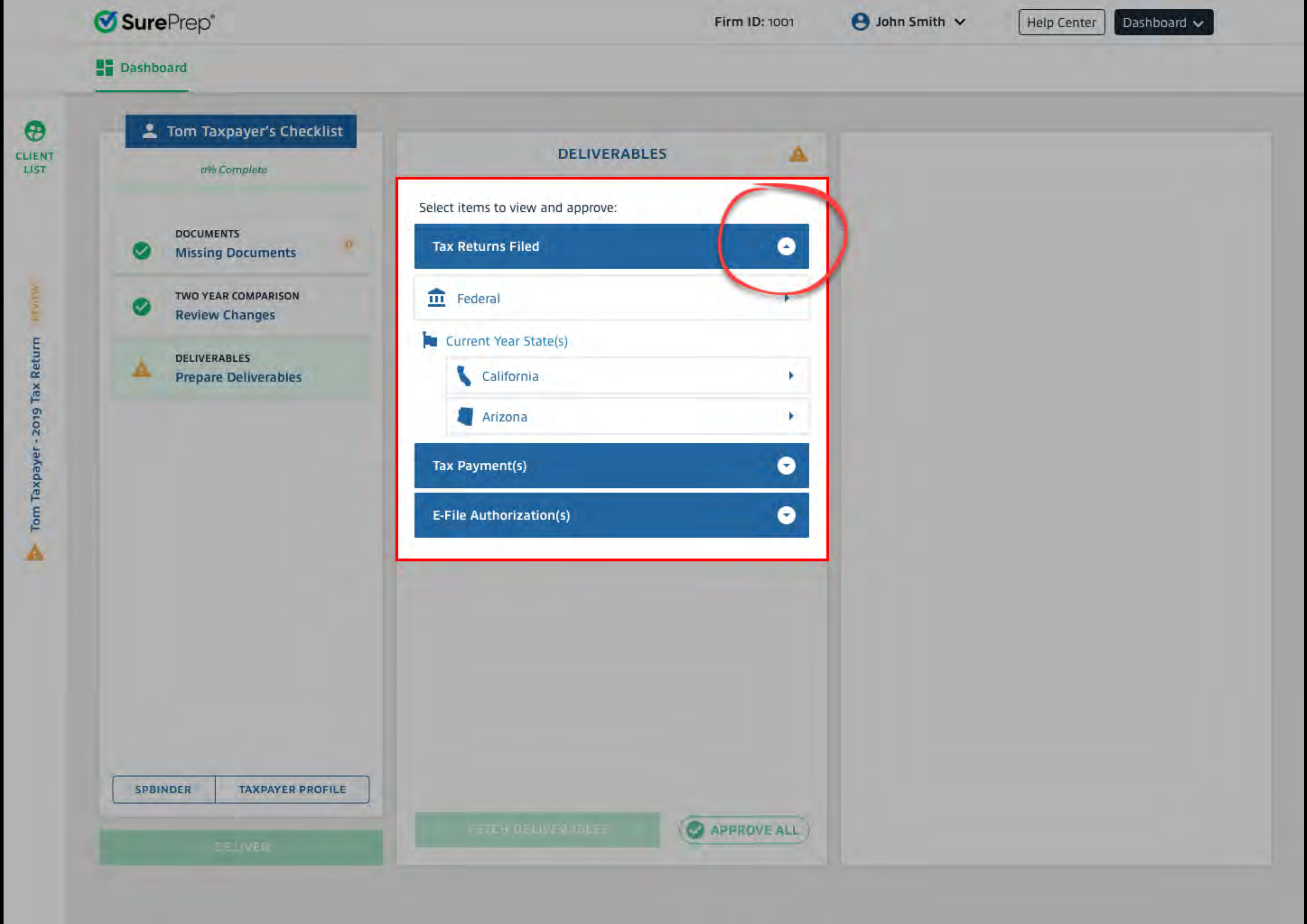
Review Changes
DELIVERABLES
Prepare Deliverables
SPBINDER
TAXPAYER PROFILE
DELIVER
DELIVERABLES
Please fetch deliverables by clicking the button below:
Tax Returns Filed
FETCH IN PROGRESS...
Tax Payment(s)
FETCH IN PROGRESS...
E-File Authorization(s)
FETCH IN PROGRESS...
FETCH IN PROGRESS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CLIENT LIST
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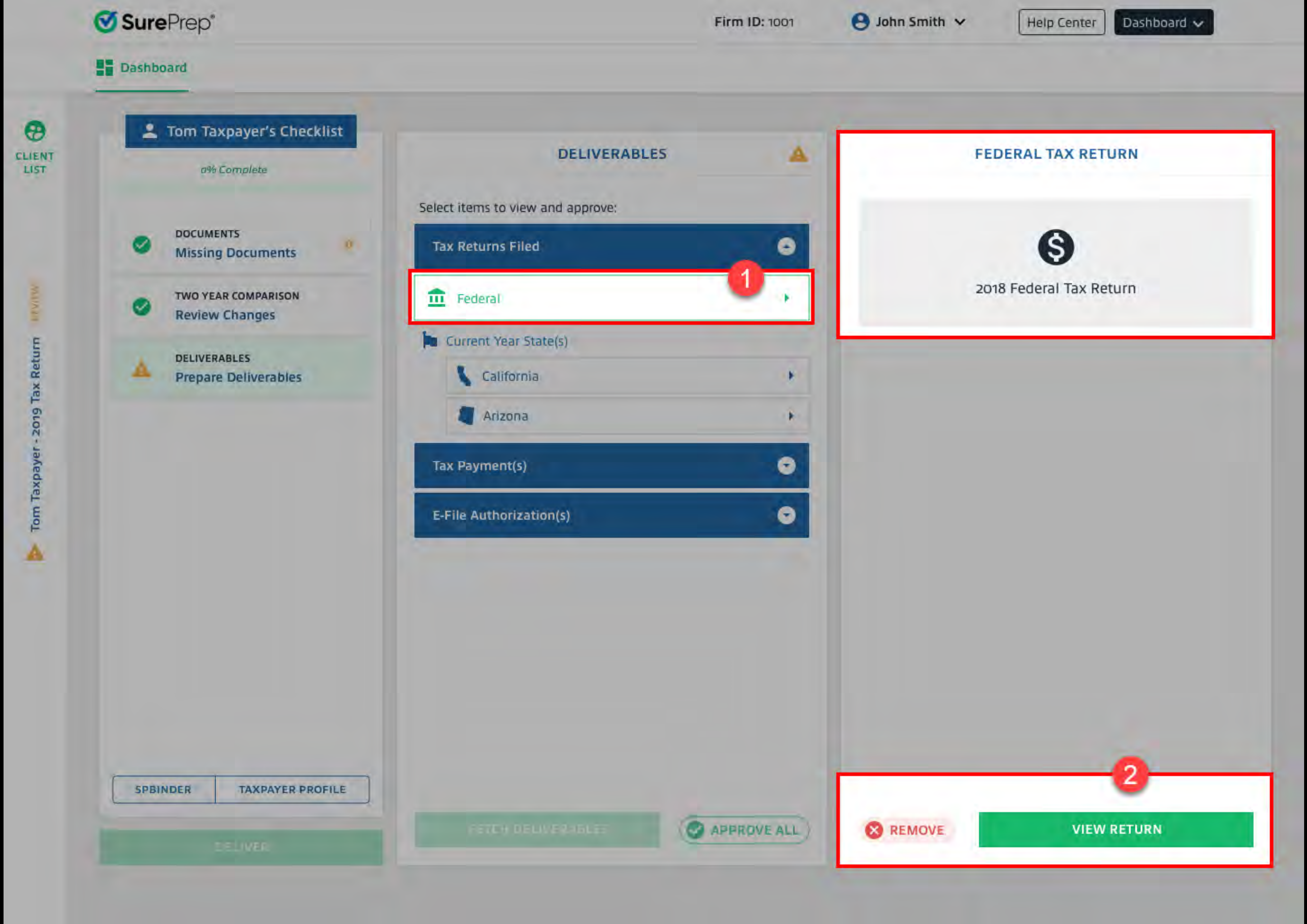
Tom Taxpayer's Checklist
0% Complete
DOCUMENTS
Missing Documents
TWO YEAR COMPARISON
Review Changes
DELIVERABLES
Prepare Deliverables
SPBINDER
TAXPAYER PROFILE
DELIVER
DELIVERABLES
Select items to view and approve:
Tax Returns Filed
Federal
Current Year State(s)
California
Arizona
Tax Payment(s)
E-File Authorization(s)
APPROVE ALL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CLIENT LIST
Tom Taxpayer - 2019 Tax Return
Tom Taxpayer's Checklist
0% Complete
DOCUMENTS
Missing Documents
TWO YEAR COMPARISON
Review Changes
DELIVERABLES
Prepare Deliverables
SPBINDER
TAXPAYER PROFILE
DELIVER
DELIVERABLES
Select items to view and approve:
Tax Returns Filed
1
Federal
Current Year State(s)
California
Arizona
Tax Payment(s)
E-File Authorization(s)
FETCH DELIVERABLES
APPROVE ALL
FEDERAL TAX RETURN
2018 Federal Tax Return
2
REMOVE
VIEW RETURN

Form **1040** Simplified

Department of the Treasury—Internal Revenue Service

U.S. Individual Income Tax Return 2018

OMB No. 1545-0074 | IRS Use Only—Do not write or staple in this space.

☐ Married filing separate return ☐ Qualifying widow(er) ☐ Head of household

Your first name and initial	Last name	**Your social security number**

Standard deduction: ☐ Someone can claim you as a dependent ☐ You were born before January 2, 1954 ☐ You are blind

Spouse or qualifying person's first name and initial (see inst.)	Last name	**Spouse's social security number**

Standard deduction: ☐ Someone can claim your spouse as a dependent ☐ Your spouse was born before January 2, 1954
☐ Your spouse is blind ☐ Your spouse itemizes on a separate return or you were dual-status alien

Home address (number and street). If you have a P.O. box, see instructions.	Apt. no.	**Presidential Election Campaign.** ✓ if you want $3 to go to this fund (see inst.) ☐ **You** ☐ **Spouse**
City, town or post office, state, and ZIP code. If you have a foreign address, attach Schedule 6.		☐ Full-year health care coverage (see instructions)

Dependents (see instructions):

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) ✓ if qualifies for (see inst.): Child tax credit	Credit for other dependents
				☐	☐
				☐	☐

Sign Here

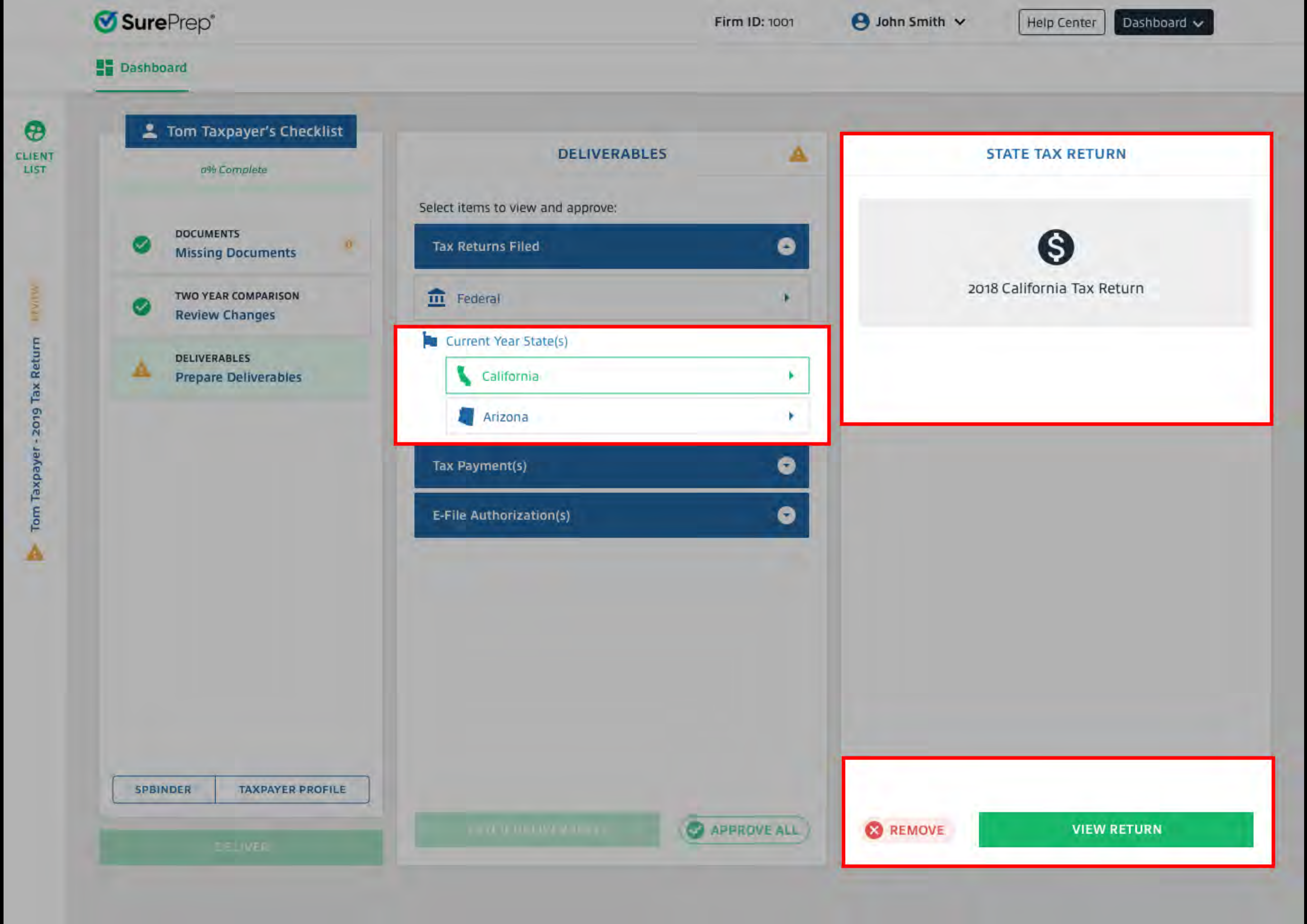
Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and accurately reflect all amounts and sources of income I received during the tax year. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

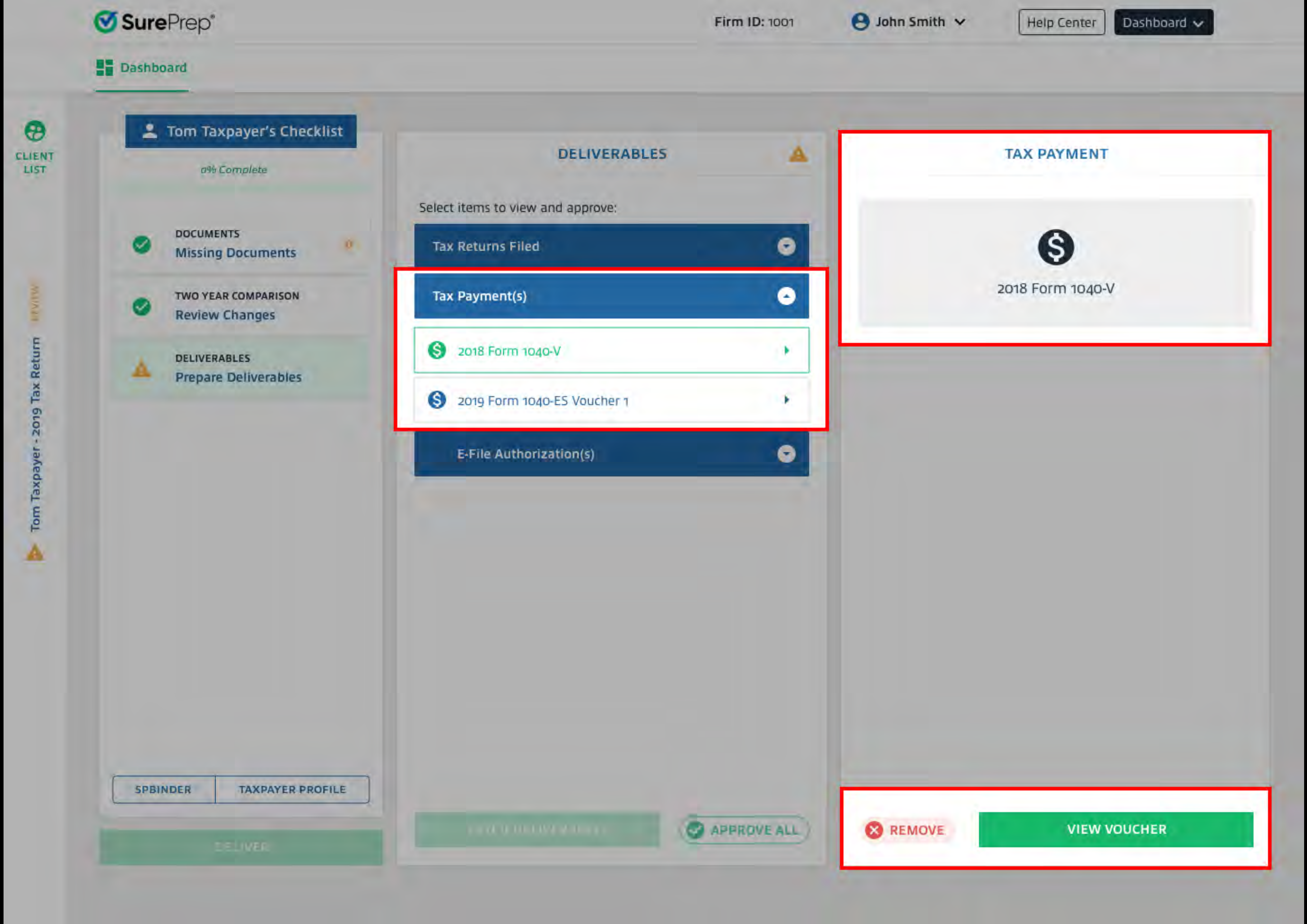
Joint return? See instructions. Keep a copy for your records.

Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
Spouse's signature. If a joint return, **both** must sign.	Date	Spouse's occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)

Paid Preparers

Print/Type preparer's name	Preparer's signature	PTIN	Check if: ☐ 3rd Party Designee ☐ Self-employed
Firm's name ▶		Firm's EIN ▶	


SurePrep
Firm ID: 1001
John Smith
Help Center
Dashboard
Dashboard
CLIENT LIST
Tom Taxpayer - 2019 Tax Return
Tom Taxpayer's Checklist
0% Complete
DOCUMENTS
Missing Documents
TWO YEAR COMPARISON
Review Changes
DELIVERABLES
Prepare Deliverables
SPBINDER
TAXPAYER PROFILE
DELIVER
DELIVERABLES
Select items to view and approve:
Tax Returns Filed
Federal
Current Year State(s)
California
Arizona
Tax Payment(s)
E-File Authorization(s)
APPROVE ALL
STATE TAX RETURN
2018 California Tax Return
REMOVE
VIEW RETURN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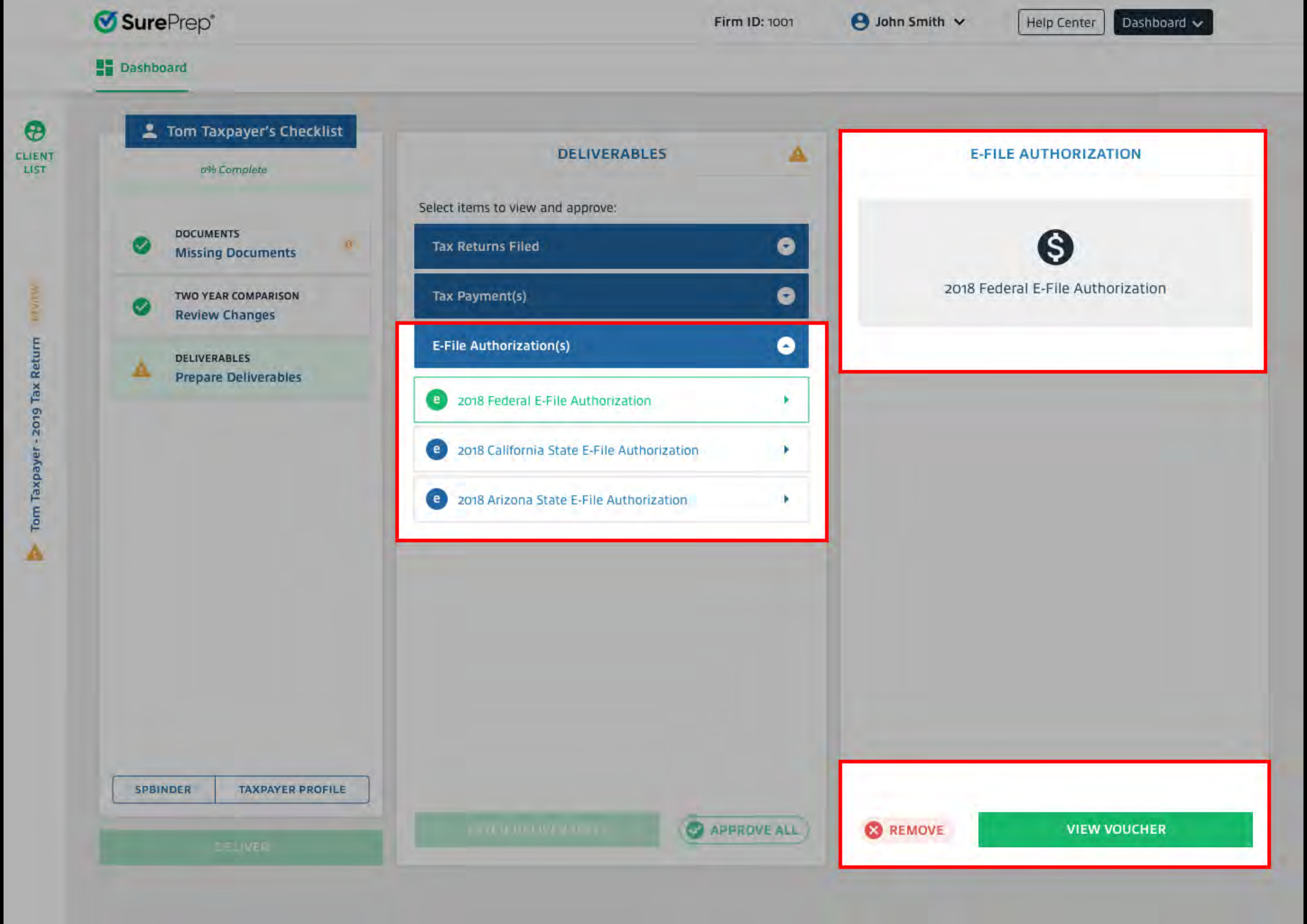
Select items to view and approve:
Tax Returns Filed
Tax Payment(s)
2018 Form 1040-V
2019 Form 1040-ES Voucher 1
E-File Authorization(s)
APPROVE ALL
TAX PAYMENT
2018 Form 1040-V
REMOVE
VIEW VOUCHER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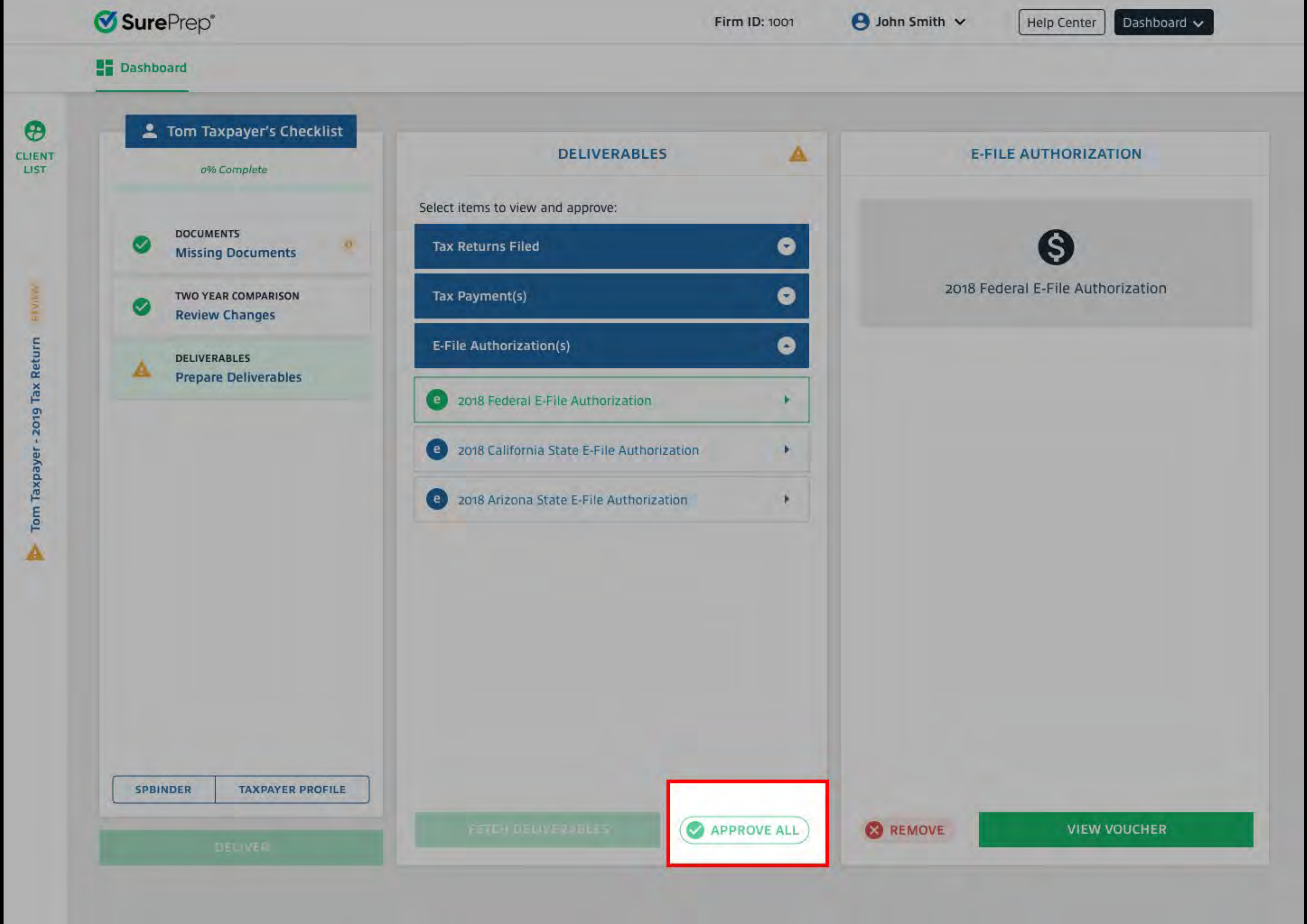
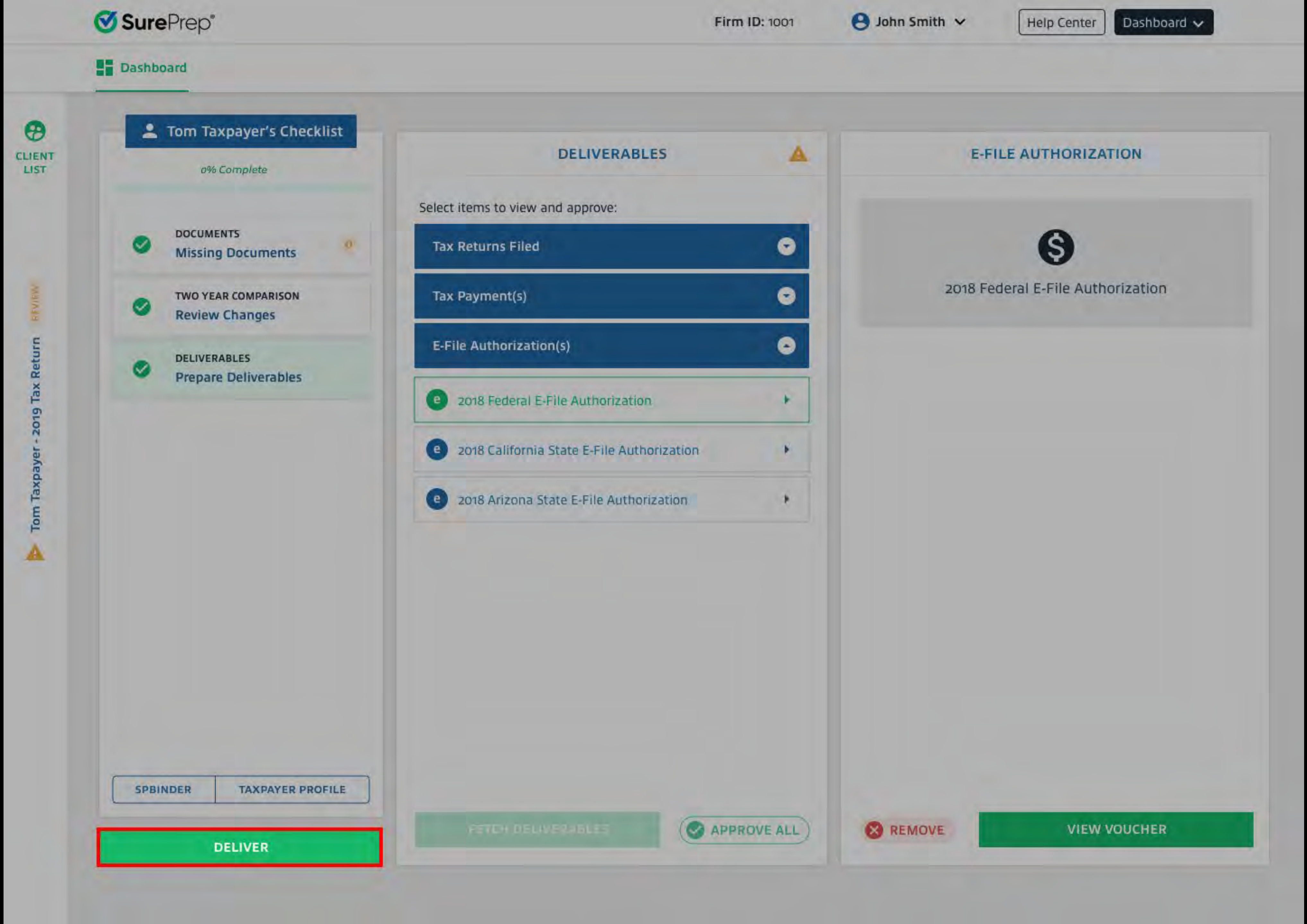
Select items to view and approve:
Tax Returns Filed
Tax Payment(s)
E-File Authorization(s)
2018 Federal E-File Authorization
2018 California State E-File Authorization
2018 Arizona State E-File Authorization
APPROVE ALL
E-FILE AUTHORIZATION
2018 Federal E-File Authorization
REMOVE
VIEW VOUCHER


SurePrep
Firm ID: 1001
John Smith
Help Center
Dashboard
Dashboard
CLIENT LIST
Tom Taxpayer - 2019 Tax Return
Tom Taxpayer's Checklist
0% Complete
DOCUMENTS
Missing Documents
TWO YEAR COMPARISON
Review Changes
DELIVERABLES
Prepare Deliverables
SPBINDER
TAXPAYER PROFILE
DELIVER
DELIVERABLES
Select items to view and approve:
Tax Returns Filed
Tax Payment(s)
E-File Authorization(s)
2018 Federal E-File Authorization
2018 California State E-File Authorization
2018 Arizona State E-File Authorization
FETCH DELIVERABLES
APPROVE ALL
E-FILE AUTHORIZATION
2018 Federal E-File Authorization
REMOVE
VIEW VOUCHER


SurePrep
Firm ID: 1001
John Smith
Help Center
Dashboard
Dashboard
CLIENT LIST
Tom Taxpayer - 2019 Tax Return
Tom Taxpayer's Checklist
0% Complete
DOCUMENTS
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TWO YEAR COMPARISON
Review Changes
DELIVERABLES
Prepare Deliverables
SPBINDER
TAXPAYER PROFILE
DELIVER
DELIVERABLES
Select items to view and approve:
Tax Returns Filed
Tax Payment(s)
E-File Authorization(s)
2018 Federal E-File Authorization
2018 California State E-File Authorization
2018 Arizona State E-File Authorization
APPROVE ALL
E-FILE AUTHORIZATION
2018 Federal E-File Authorization
REMOVE
VIEW VOUCHER

TAXCADDY

Tom Taxpayer

B·L

Overview | Documents | Messages | Tax Returns | Tax Payments | Invoices

Tax Year 2017 2018 2019

Phase: Review and File

View Tax Returns

Filing Instructions

Document Name	Requested On
2019 Filing Instructions	10/30/2019 - 12:24 PM

Federal Tax Return

Document Name	Requested On
2019 Federal Tax Return	10/30/2019 - 12:24 PM

State Tax Return

Document Name	Requested On
2019 Arizona Tax Return	10/30/2019 - 12:24 PM
2019 California Tax Return	10/30/2019 - 12:24 PM

Tax Summary

Federal

AGI	Taxable Income
$ 235,000	$ 198,000

Effective Tax Rate	Total Tax
23.4 %	$ 46,332

Amount Owed
$ 6,200

California

AGI	Taxable Income
$ 235,000	$ 198,000

Effective Tax Rate	Total Tax
23.4 %	$ 46,332

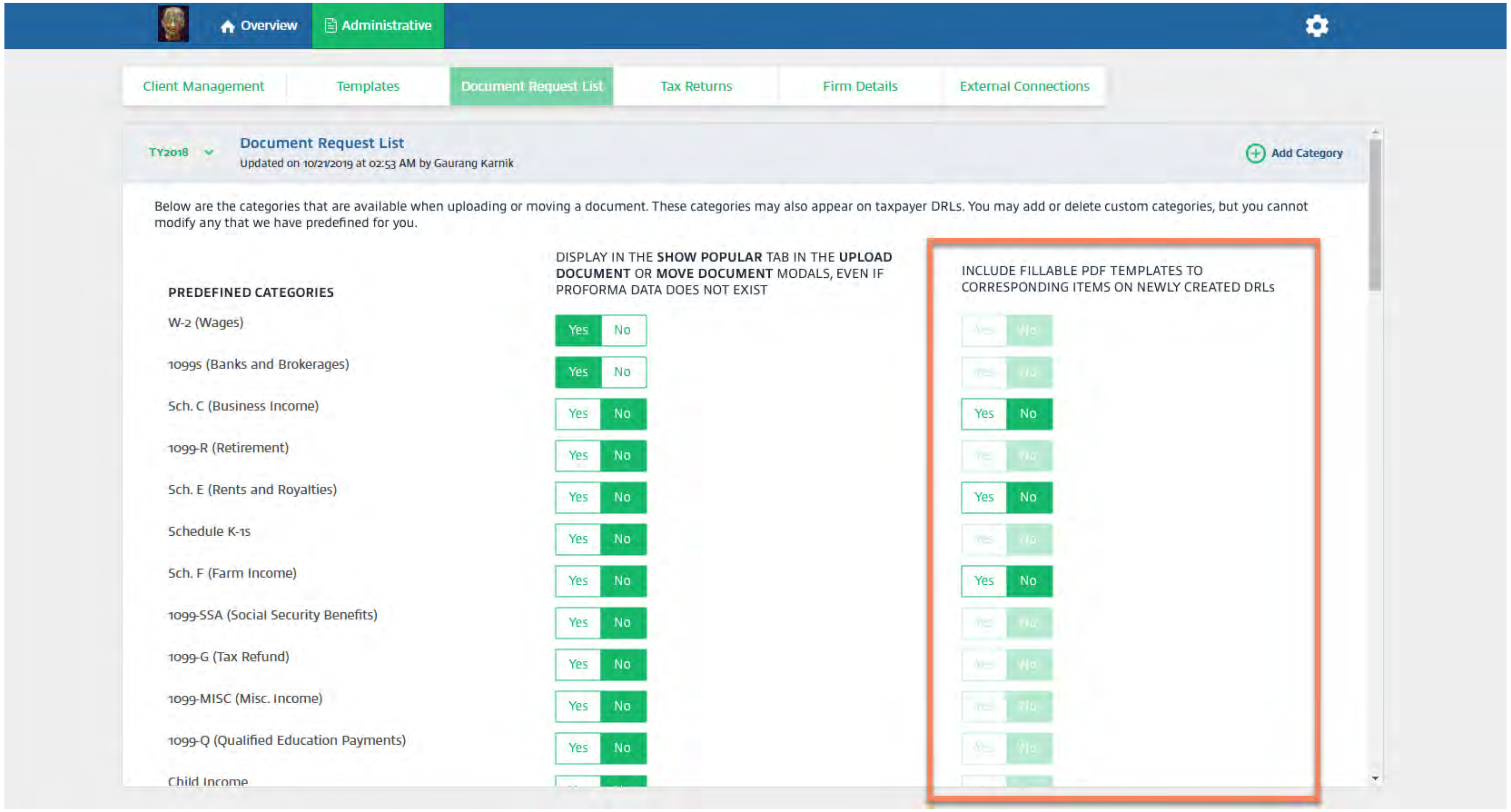
Amount Refunded
$ 15,300

Arizona

Support

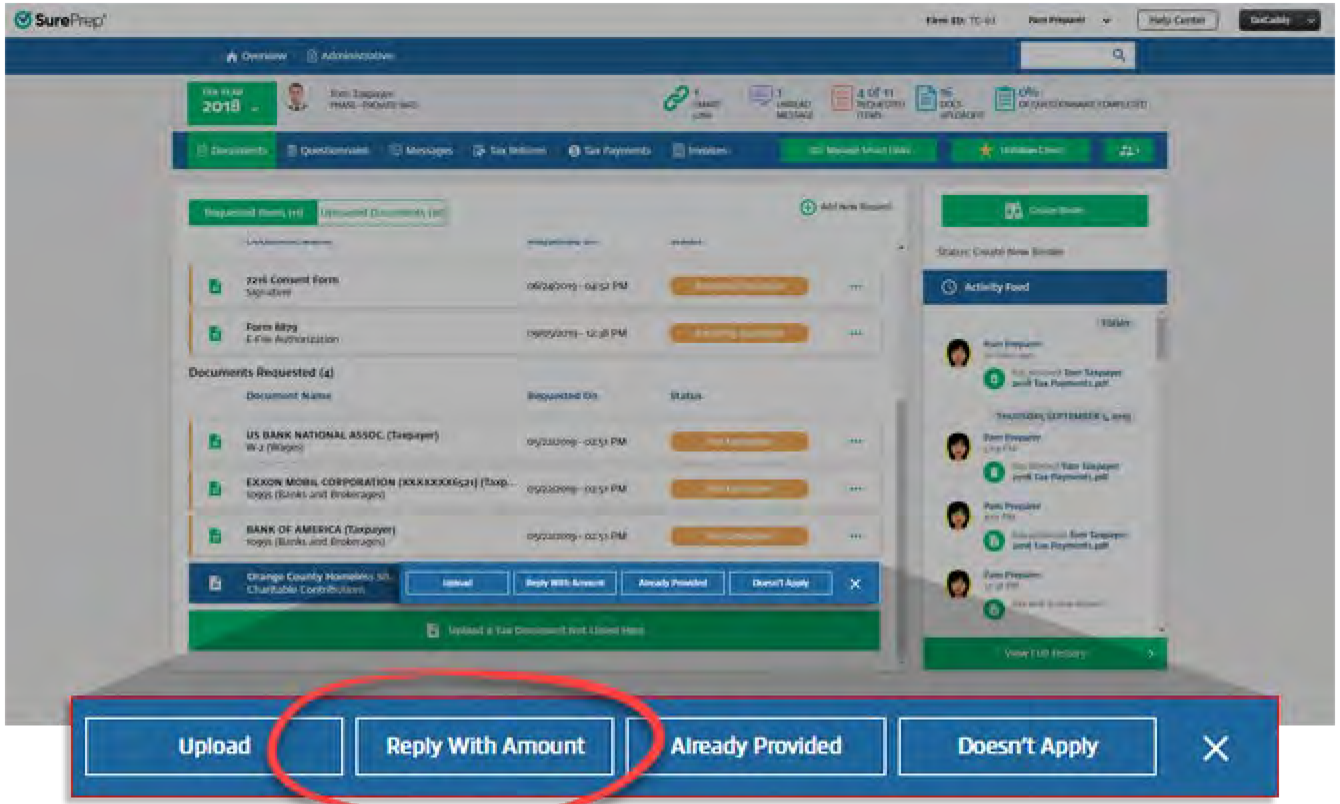
Custom DRL to Include Fillable Organizers

- Enable categories to include fillable PDF templates



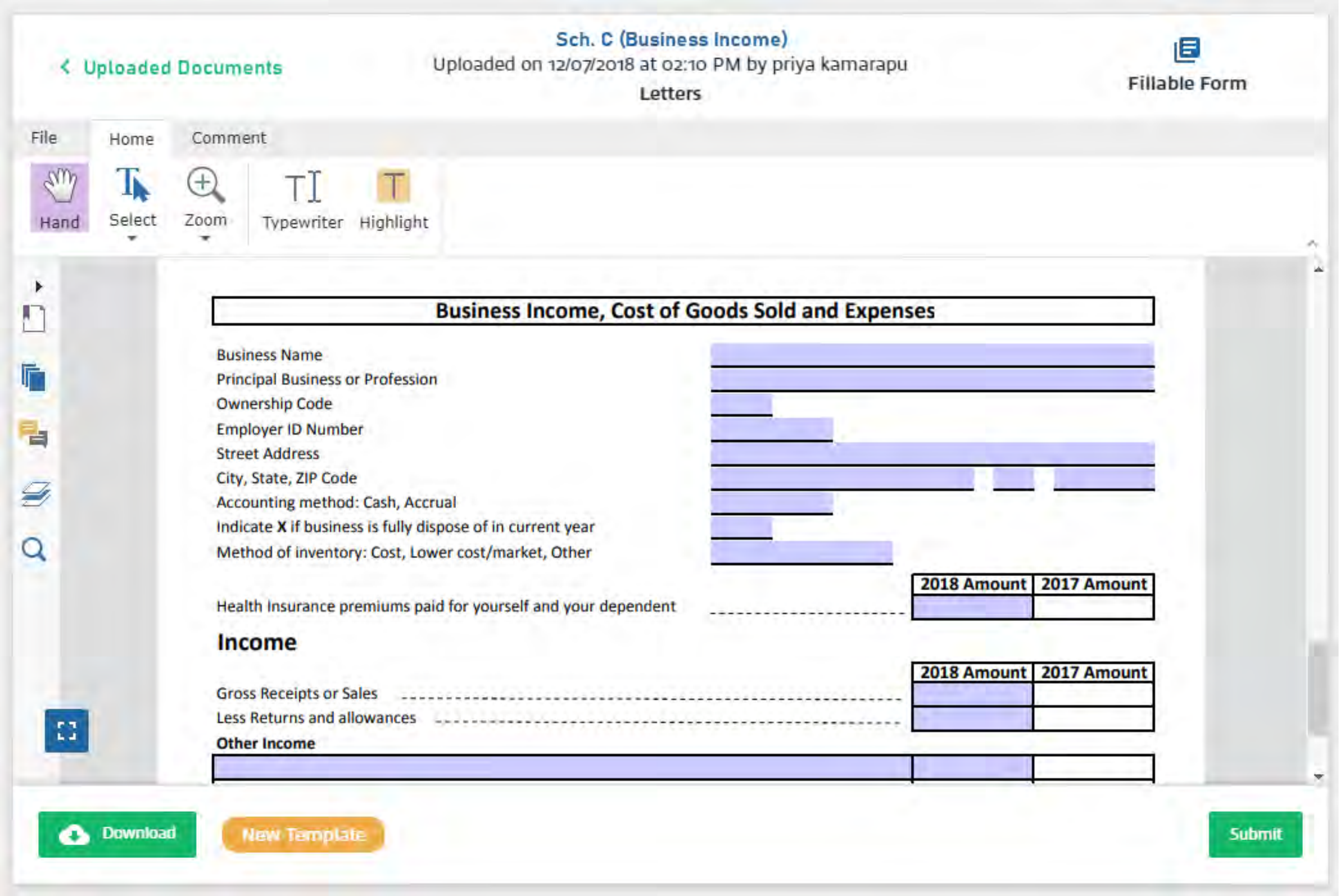
Custom DRL to Include Fillable Organizers

- Taxpayers access their fillable organizers from their DRL Request Items



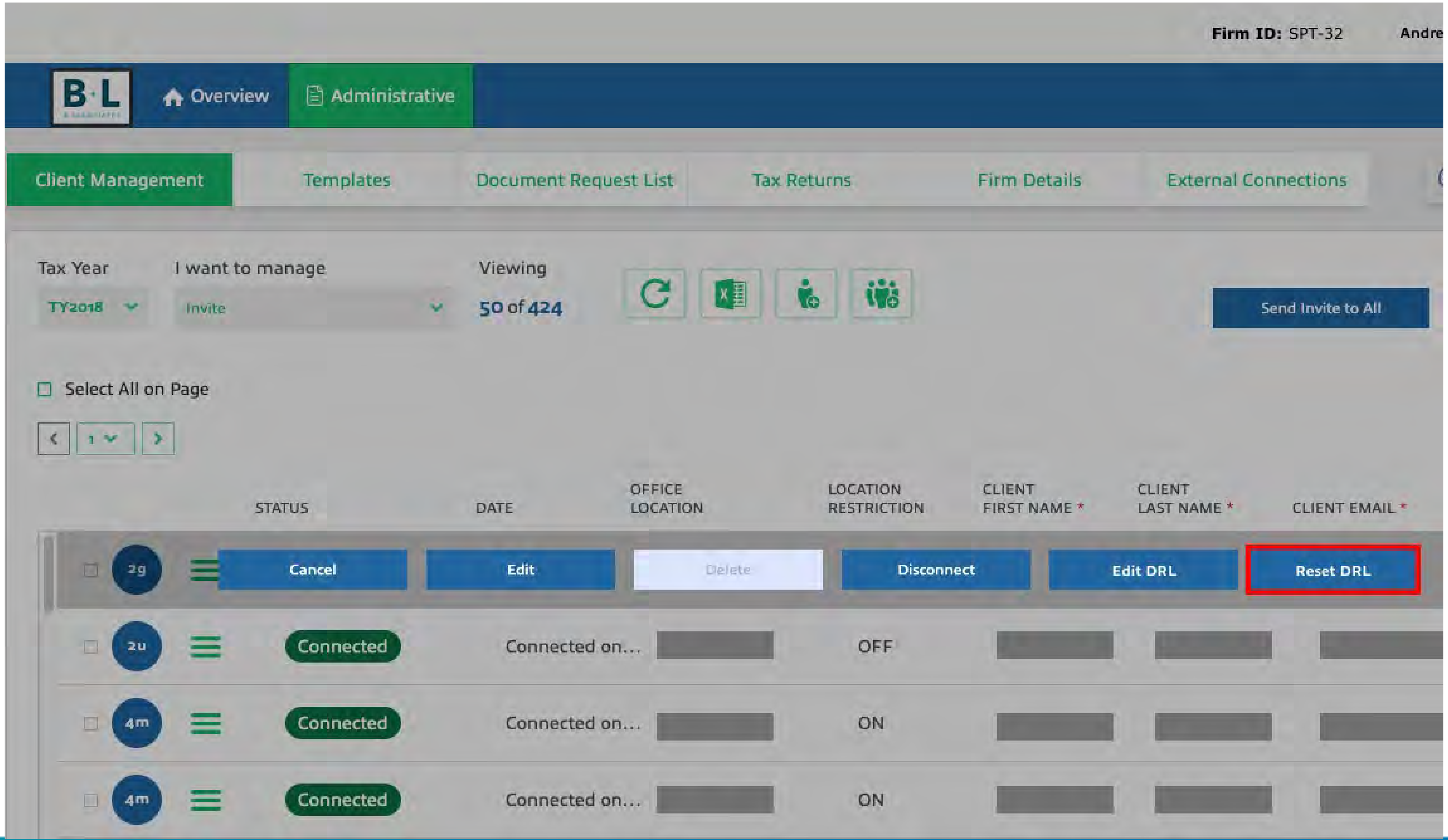
Custom DRL to Include Fillable Organizers

- Taxpayers fill out fillable organizers online
- When available, PY data will populate onto taxpayer fillable organizers



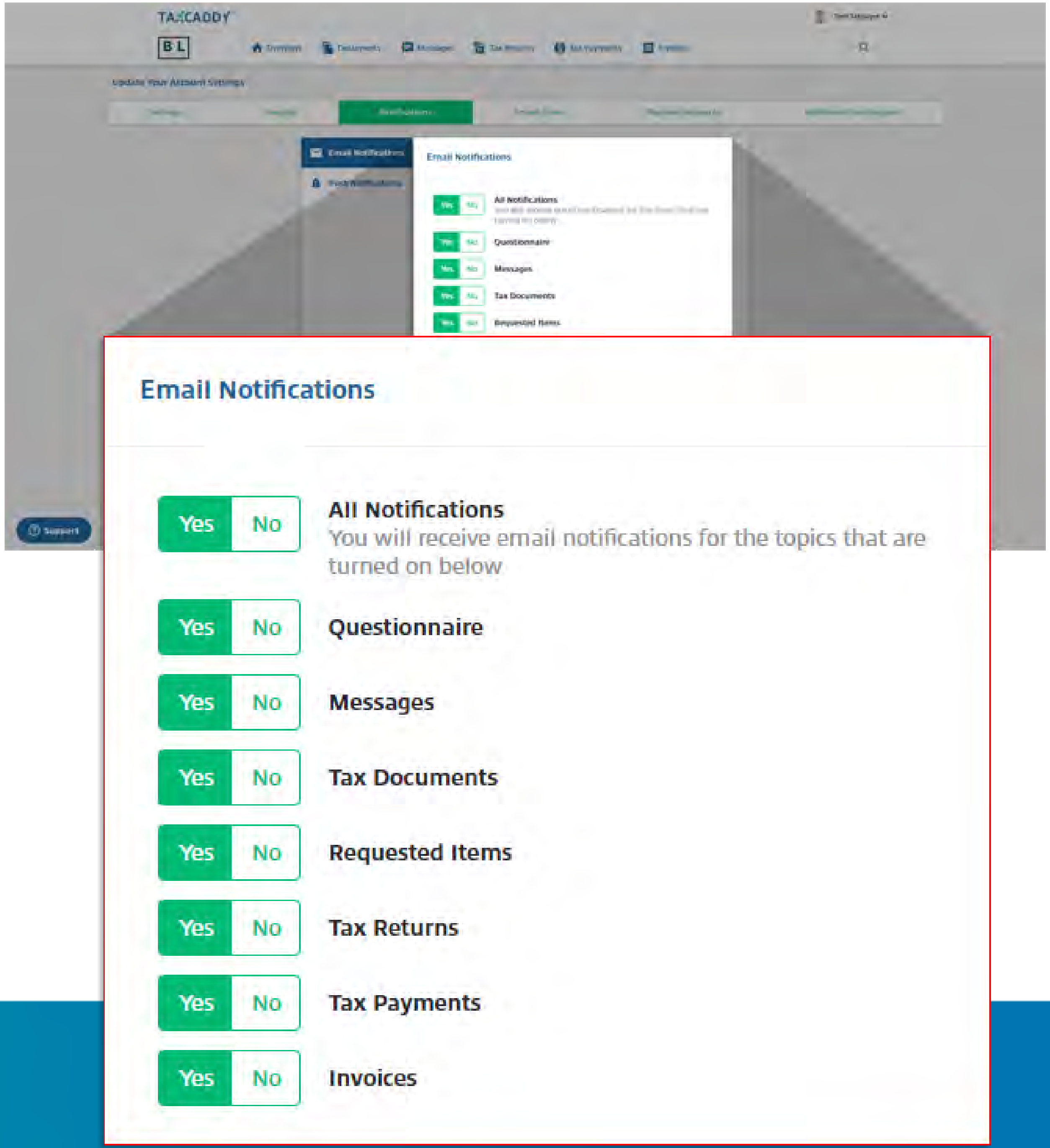
Reset DRL

- Tax professionals will be able to reset any created DRL before sending it to their clients



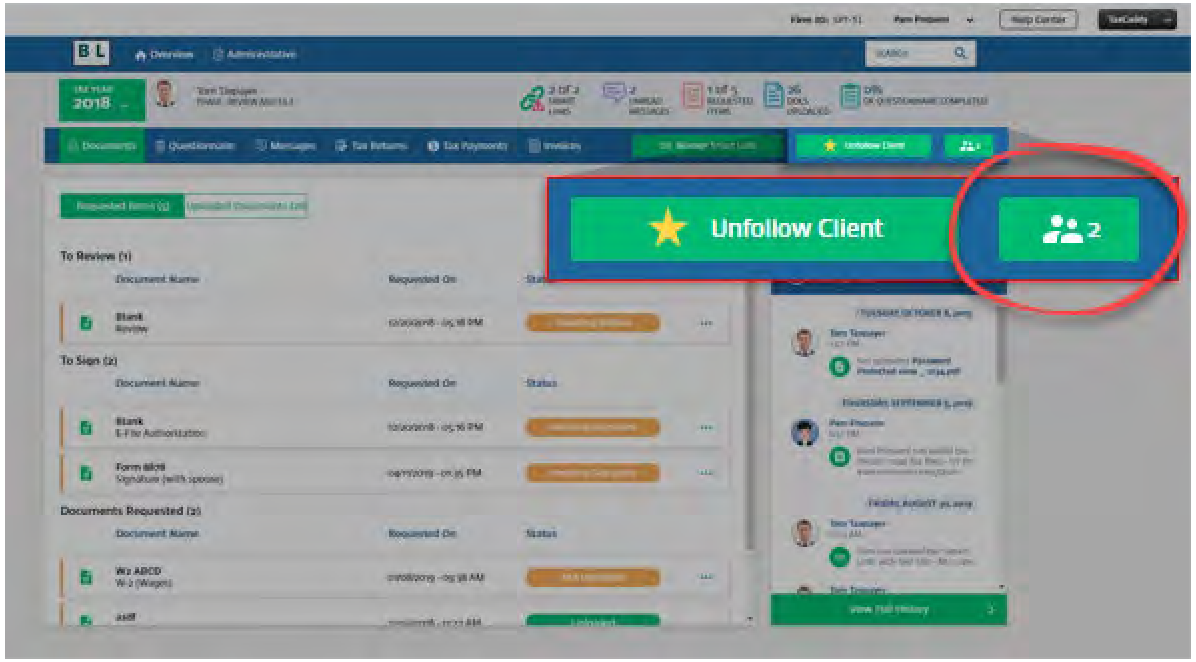
Spouse Notifications

- TaxCaddy spouse users will be able to receive and control the same email notifications the primary account holder has, giving them the ability to more fully take on managing the account

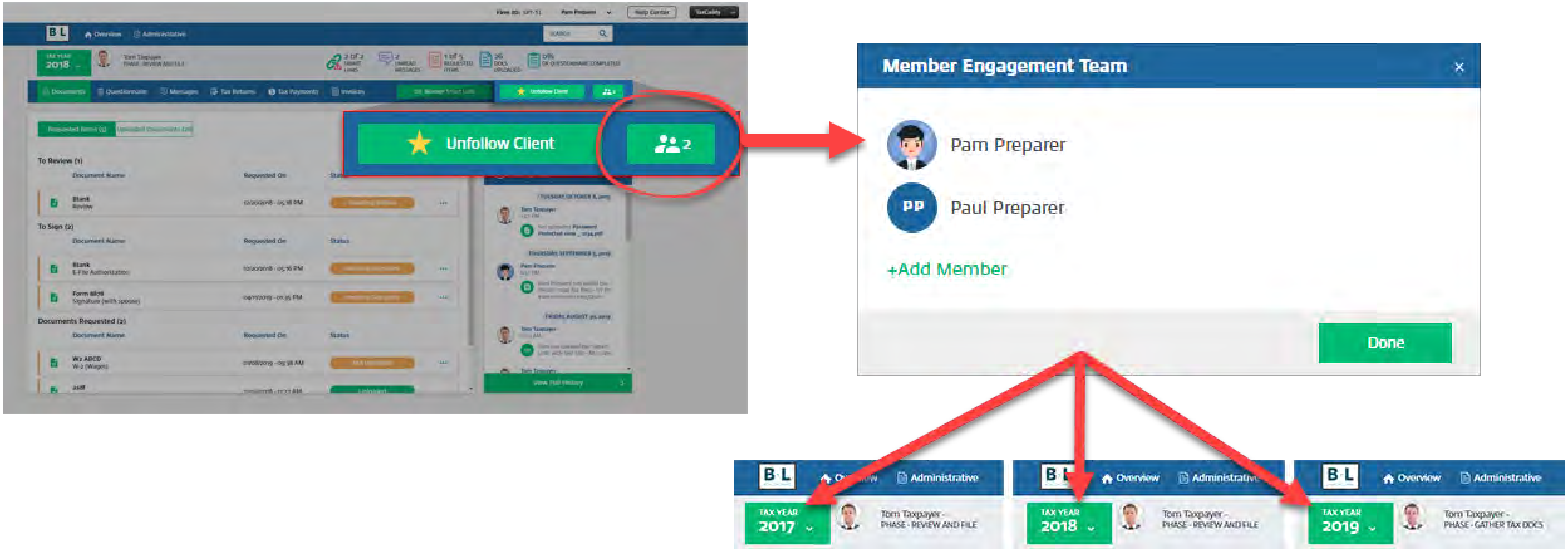


Owner, Followers and Members Stay in Sync

- Owners, followers and assigned members now sync across all tax years. Tax professionals will no longer need to rollover followers and assigned members!

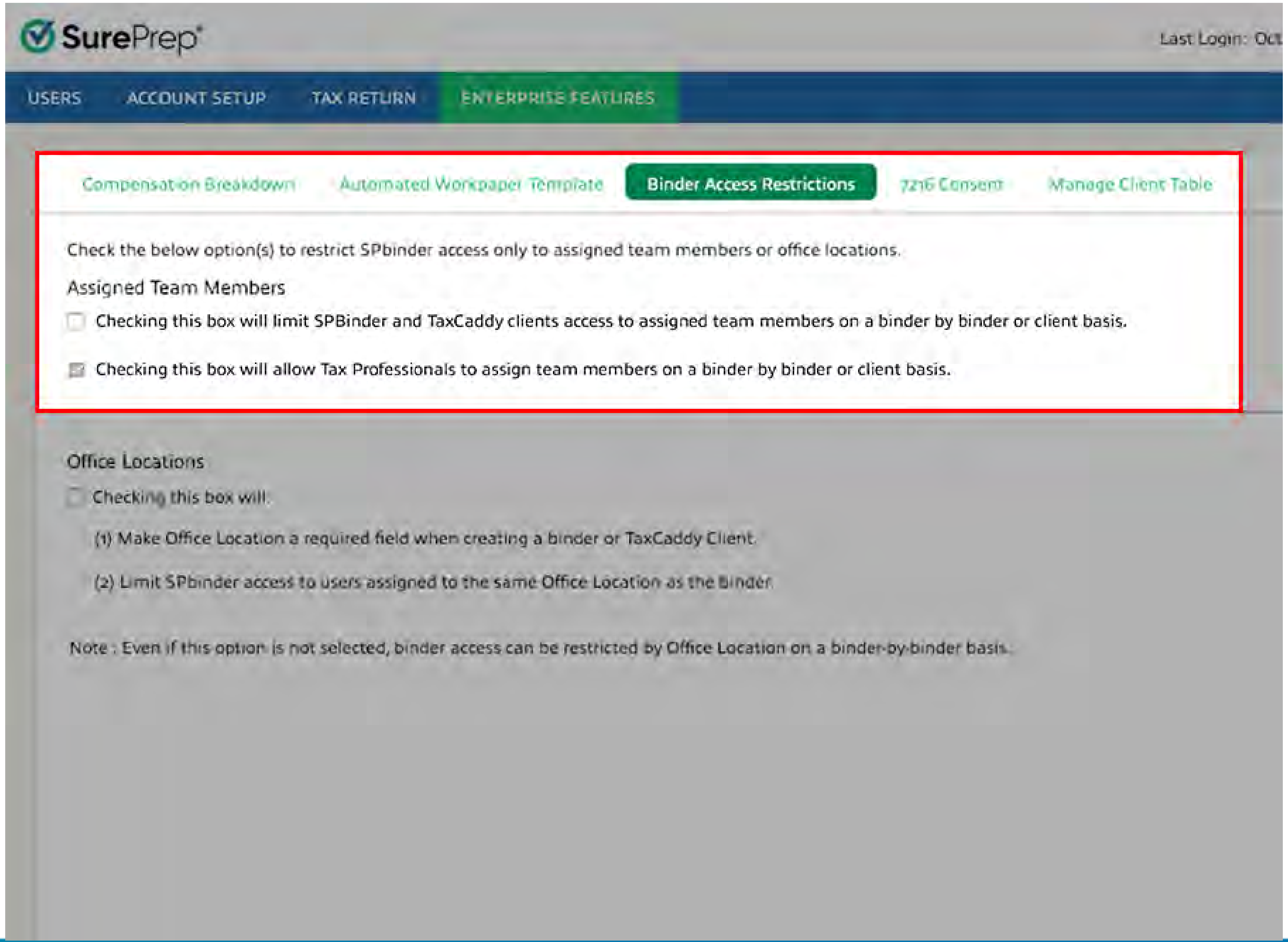


Owner, Followers and Members Stay in Sync

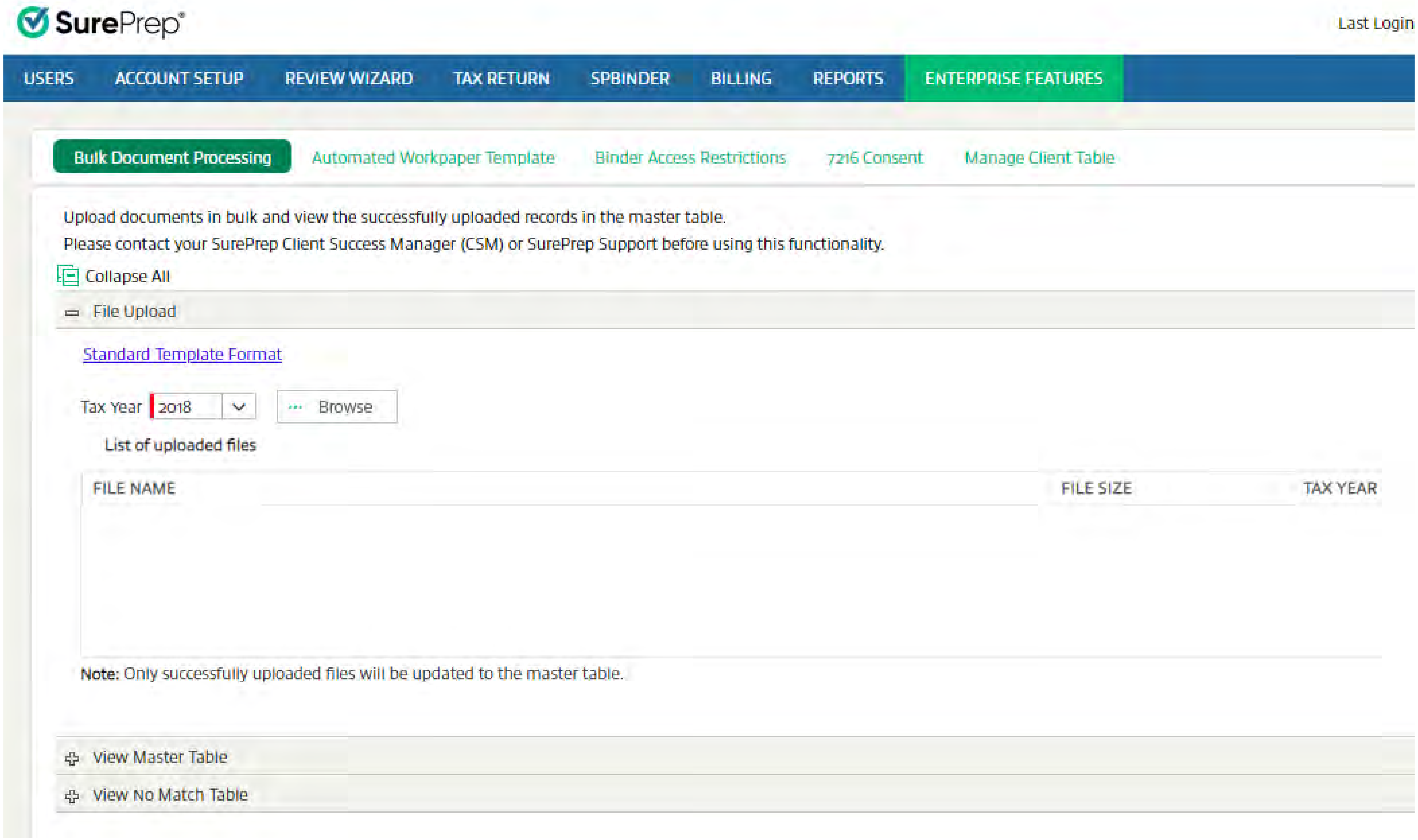


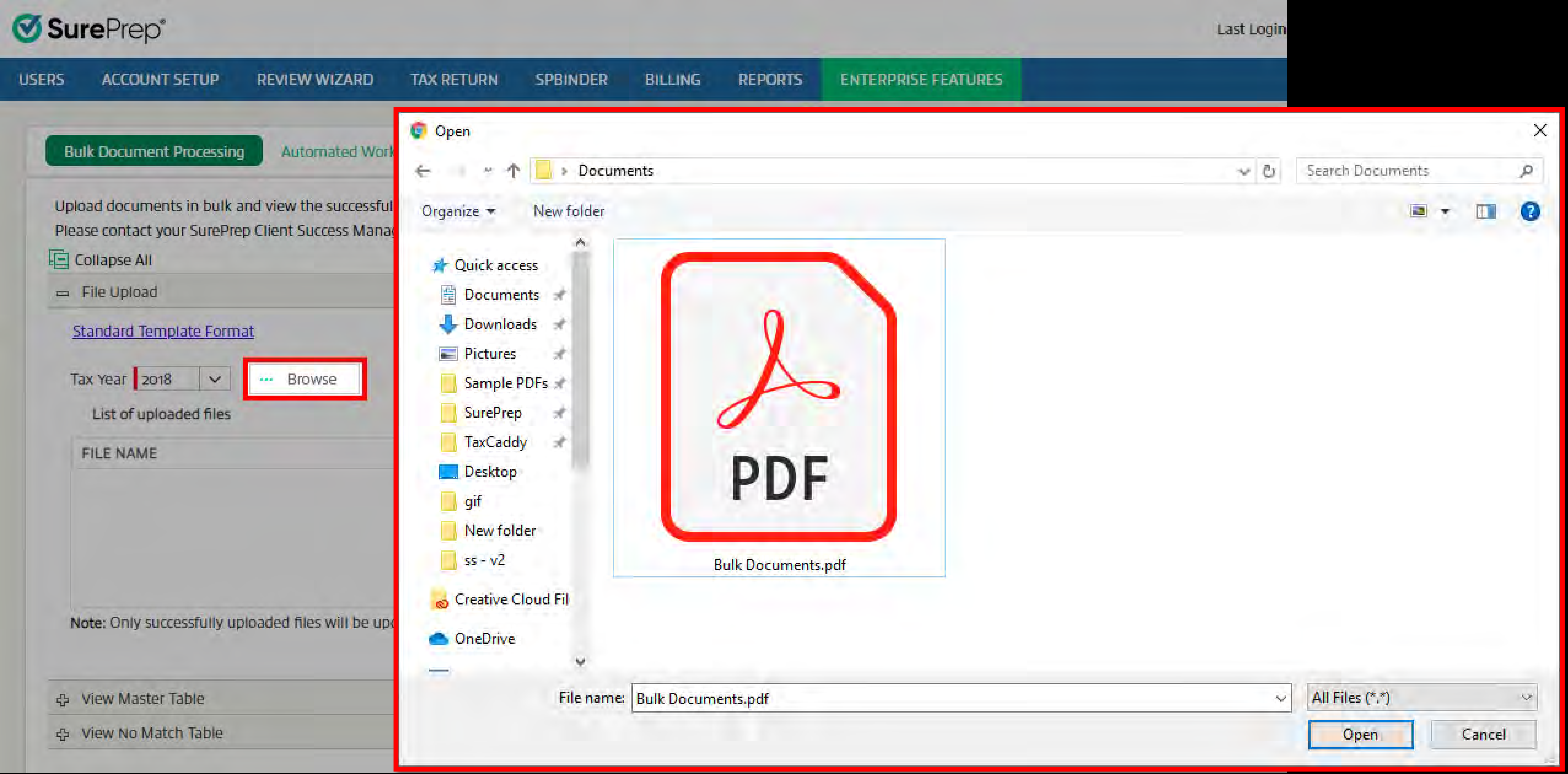
Assigned Members restrictions

- Binder access restrictions have been enhanced to allow firms to select at the domain level whether they would like to allow adding team members at binder level.

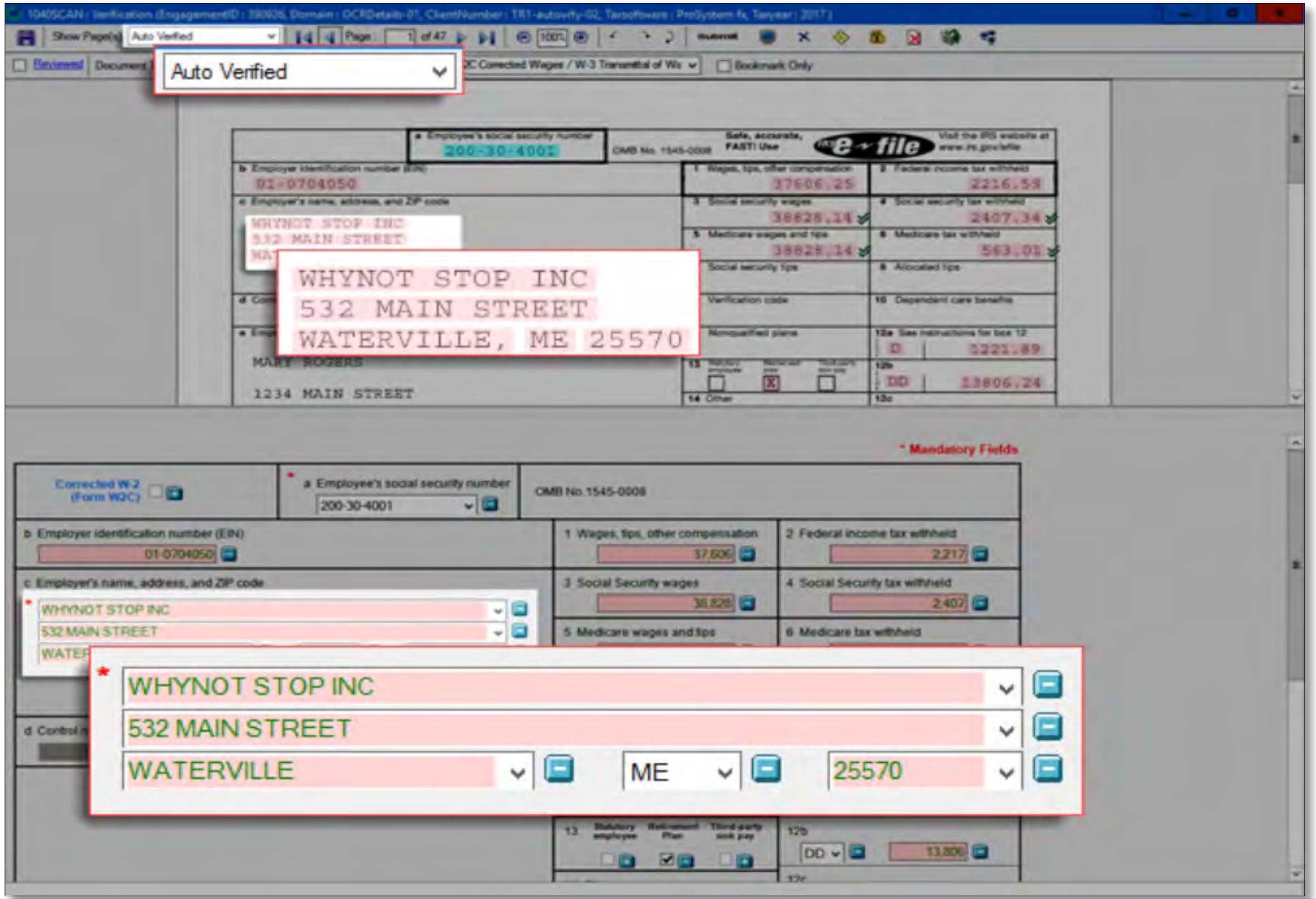


Bulk Document Processing



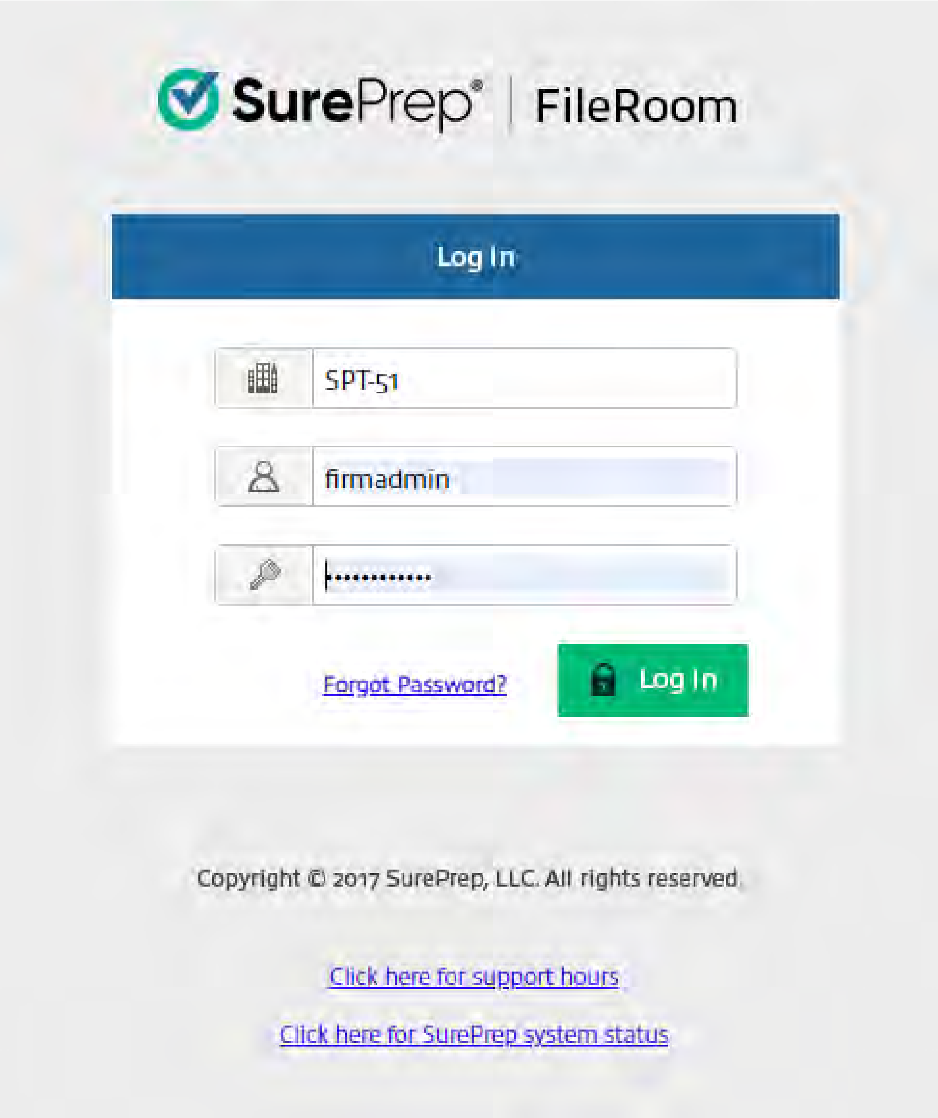

SurePrep
Last Login
USERS
ACCOUNT SETUP
REVIEW WIZARD
TAX RETURN
SPBINDER
BILLING
REPORTS
ENTERPRISE FEATURES
Bulk Document Processing
Automated Work
Upload documents in bulk and view the successful
Please contact your SurePrep Client Success Manag
Collapse All
File Upload
Standard Template Format
Tax Year 2018
Browse
List of uploaded files
FILE NAME
Note: Only successfully uploaded files will be up
View Master Table
View No Match Table
Open
Documents
Search Documents
Organize
New folder
Quick access
Documents
Downloads
Pictures
Sample PDFs
SurePrep
TaxCaddy
Desktop
gif
New folder
ss - v2
Creative Cloud Fil
OneDrive
PDF
Bulk Documents.pdf
File name:
Bulk Documents.pdf
All Files (*.*)
Open
Cancel

Improvements to Native PDF Processing



Two Factor Authentication

- Tax professionals will be able to securely login to FileRoom using Two Factor Authentication



Additional Security

Two Factor Authentication ?

Please enter the code sent to your email at su******@gmail.com. This code will expire in 5 minutes.

Attempt 1 of 4

098765

Didn't recieve the code? Resend Code

VERIFY

☐ Don't ask again on this device

If you no longer have access to this email, please contact your firm's system administrator.

SurePrep® Last Login: Oct 29,2019 06:46:00 PM Firm ID: SPT-51 Units Remaining Pam Preparer Help Center FileRoom

+ CREATE NEW BINDER | COLUMN SETUP | DOWNLOAD FILES | CLEAR FILTER | 2018 | Show All Binders | 3 | EXPORT TO EXCEL | Search

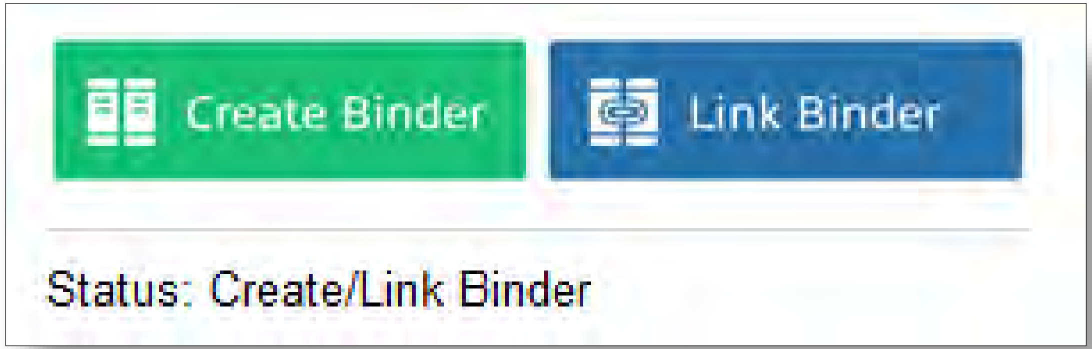
↑ Status ✕

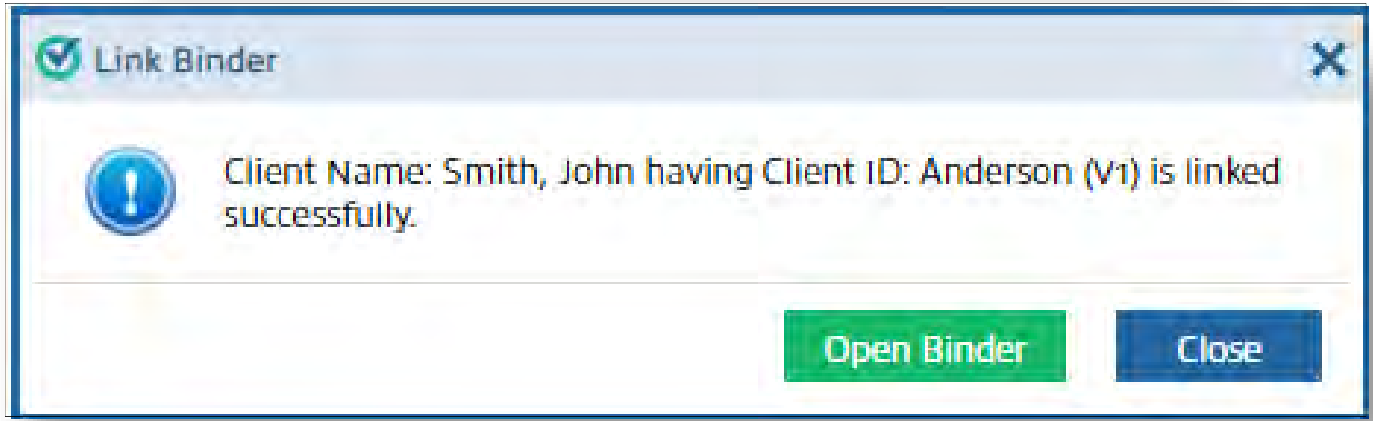
	EDIT	⚠ ↓ OPTIONS	CLIENT ID	MEMBERS	CLIENT NAME	BINDER ID	STATUS	SERVICE	LEADSHEETS	TAX :
Status:										
☐	✎		[redacted]	1	[redacted]	9687822		1040SCAN PRO	Classic Leadsheets	ProS
☐	✎		[redacted]	1	[redacted]	9643570		1040SCAN PRO	Classic Leadsheets	ProS
☐	✎		[redacted]	1	[redacted]	9691960		1040SCAN PRO	Simplified Leadsheets	CCH
☐	✎		[redacted]	1	[redacted]	9692051		1040SCANverify Onshore	Simplified Leadsheets	CCH
☐	✎		[redacted]	1	[redacted]	9643589		1040SCAN PRO	Classic Leadsheets	ProS
☐	✎		[redacted]	1	[redacted]	9588342		1040SCANverify Onshore	Classic Leadsheets	CCH
☐	✎		[redacted]	1	[redacted]	9415236		1040SCANverify Onshore	Classic Leadsheets	ProS
☐	✎		A2b	1	Anderson, Jack	8033152		1040SCAN PRO	Classic Leadsheets	Lace
☐	✎		Simplified (V1)	1	TAXPAYER, TOM	9705487		1040SCANverify Onshore	Simplified Leadsheets	CCH
Status: In Verification										
☐	✎		[redacted]	1	[redacted]	9663534	In Verification	1040SCAN PRO	Classic Leadsheets	ProS
☐	✎		[redacted]	1	[redacted]	9663540	In Verification	1040SCAN PRO	Classic Leadsheets	ProS
☐	✎		[redacted]	1	[redacted]	9528759	In Verification	1040SCAN PRO	Classic Leadsheets	ProS
☐	✎		[redacted]	1	[redacted]	9643463	In Verification	1040SCAN PRO	Classic Leadsheets	ProS

Displaying items 1 - 20 of 20 | 1 | Records per page: 20

Link TaxCaddy to SPbinder

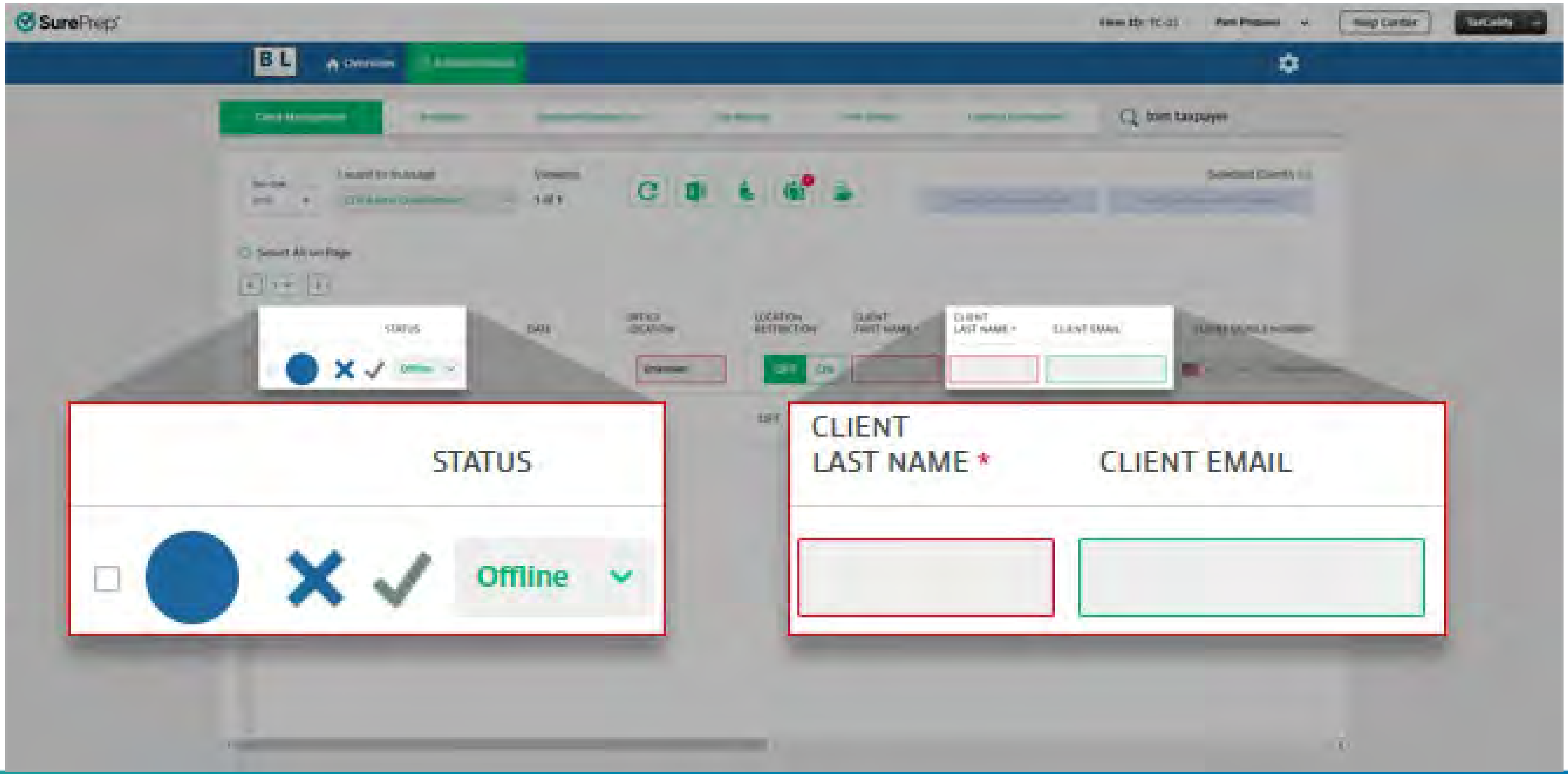
- Tax professionals will be able to link an existing binder in FileRoom to a newly connected client in TaxCaddy



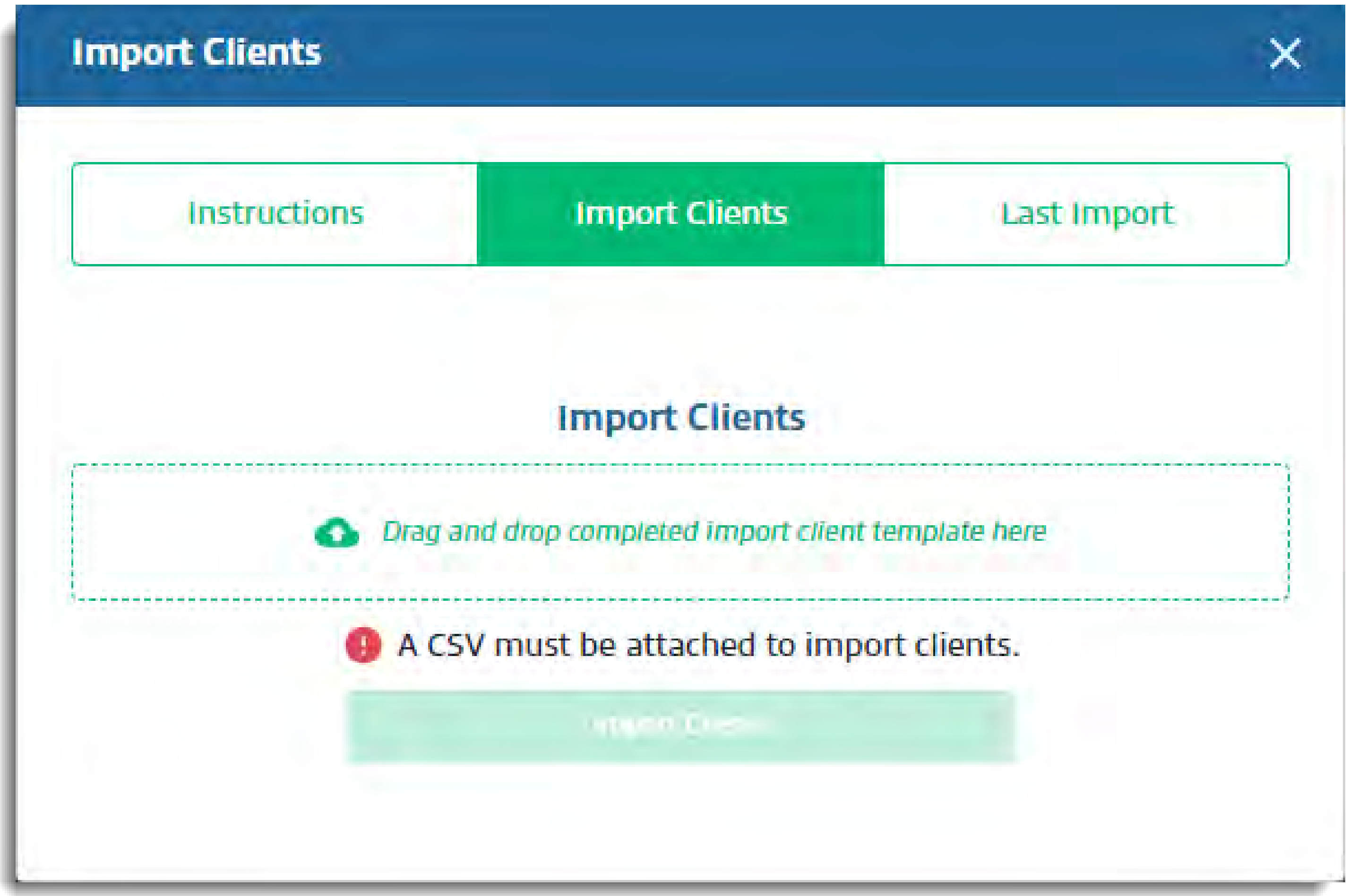


Improvements to Offline Accounts

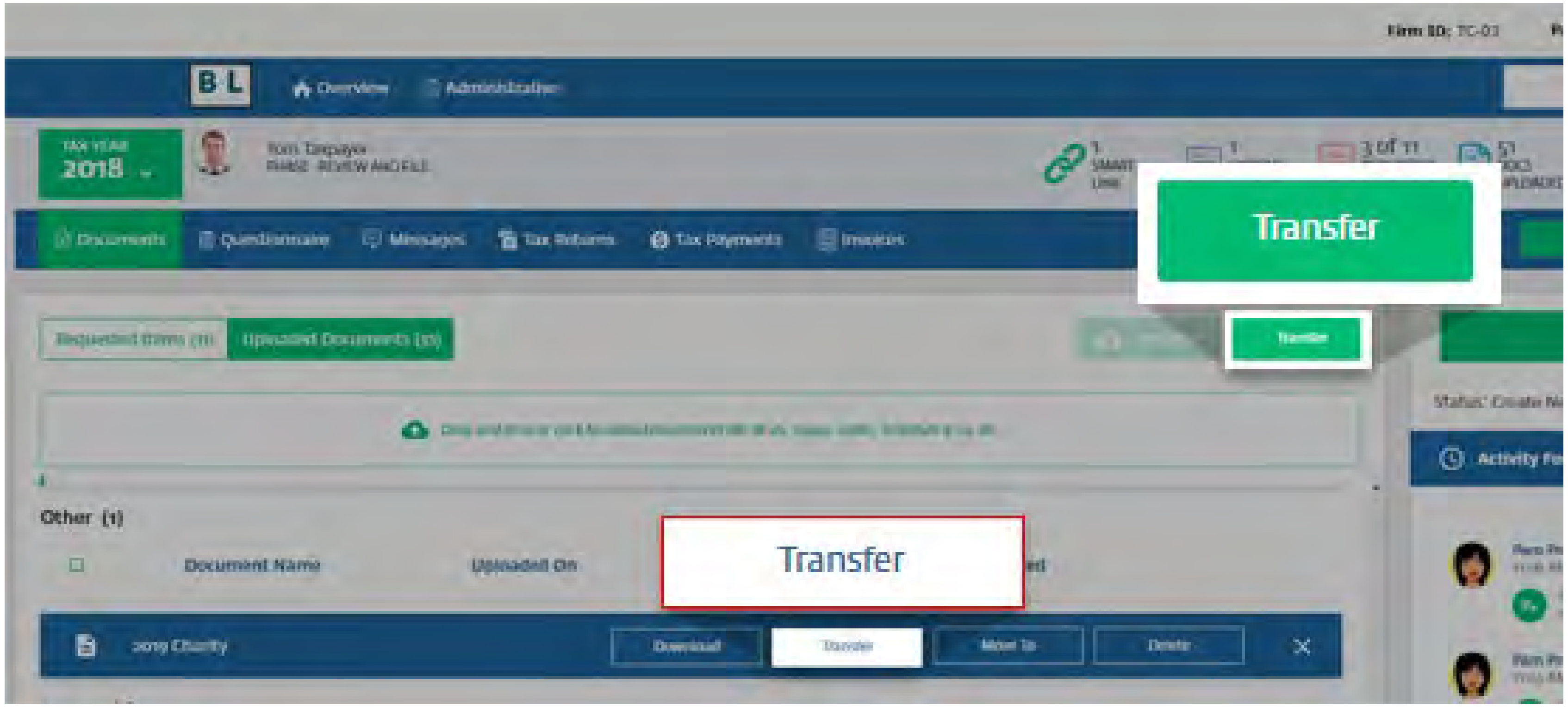
Tax professionals will be able to add offline clients without needing to populate the email field.



- Tax professionals will be able to import offline clients into TaxCaddy in bulk.

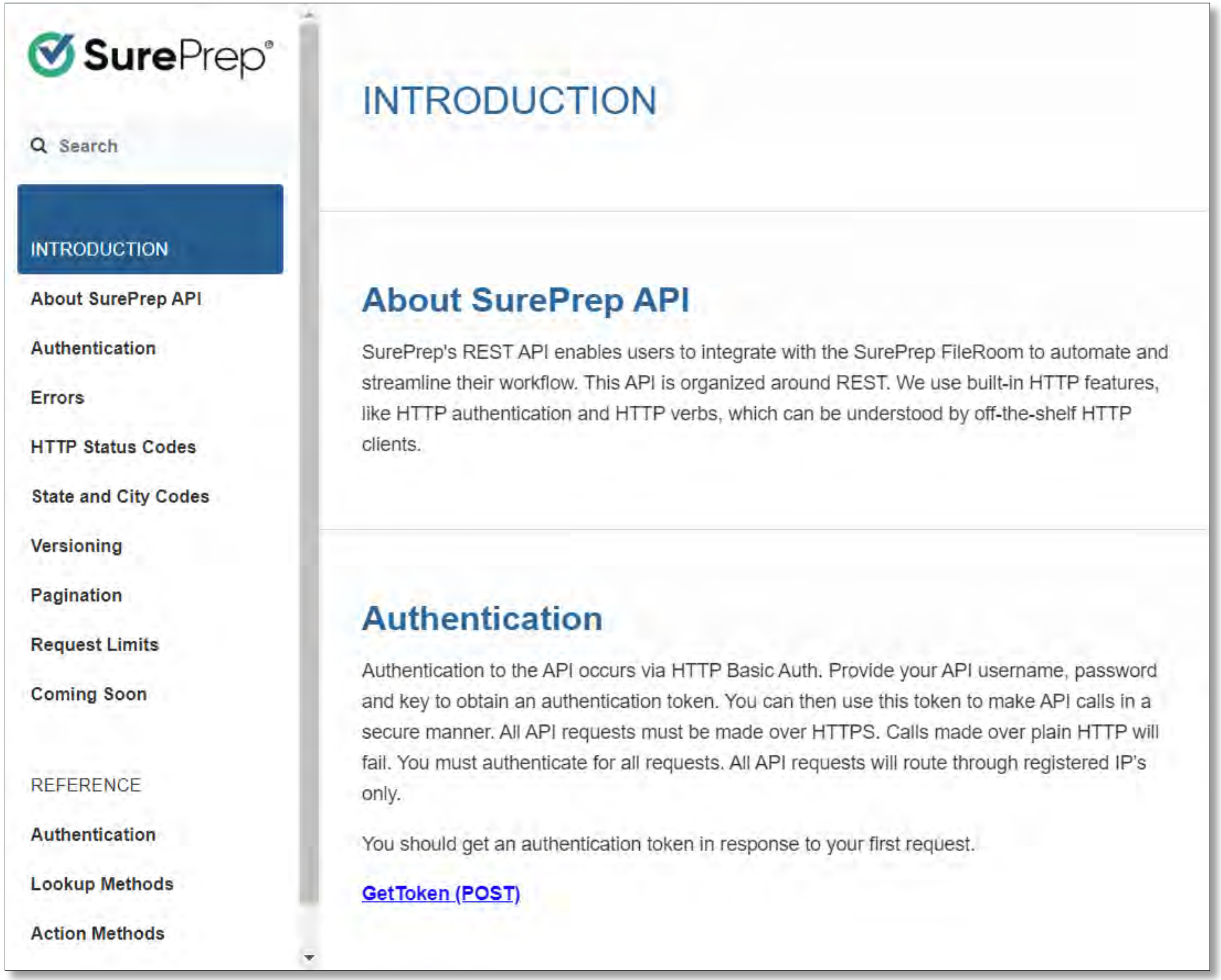


- Ability to transfer documents (copy) documents from one TaxCaddy client profile to another – Including between offline and connected clients



SurePrep APIs

- Ability to download PDFs for FileRoom binders
- Bookmark Only
- Ability to create 1041 binders



Sneak Peek

- Full Text Search
- Document Flagging
- Tax Payment Processing

Q & A

Contact Info

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www.sureprep.com