

Getting started is as easy as 1, 2, 3

TaxCaddy is an exciting new solution that simplifies tax time by allowing you to collaborate with your tax professional more easily than ever before. Following is a getting started overview.

1 Sign Up

You will receive a TaxCaddy invitation email from your tax professional. From the email, click the Sign Up Free button. Create a password, select your three security questions and follow the steps to create your TaxCaddy account.

2 Connect

Log in to your TaxCaddy account and accept your tax professional's connection request. Accepting the connection request allows your tax professional to send you messages and requests, see your tax documents, send you letters and upload your tax return for your review.

3 Begin

Your spouse or a financial advisor can be added as an additional user and granted access to your TaxCaddy account at any time. Link to your banks and brokerages and let TaxCaddy automatically retrieve your tax documents. Install the TaxCaddy app for iPhone or Android to take photographs of paper documents as you receive them.