



## SurePrep and Thomson Reuters

### Integration to streamline the entire 1040 process for tax professionals and taxpayers

SurePrep's integration with Thomson Reuters® UltraTax CS and GoSystem Tax RS makes your tax practice more productive and profitable. The AI-powered combination of 1040SCAN, SPbinder, and TaxCaddy integrate with your existing tax software to automate each phase of the tax prep process.



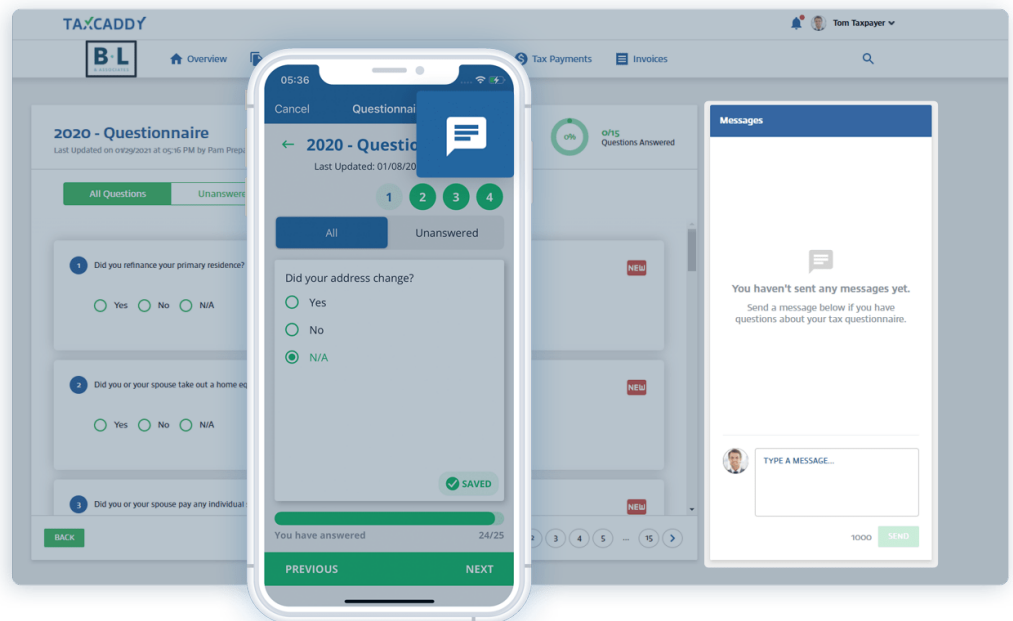
#### 1. Gather

Firm administrators no longer need to print, scan, or mail documents to clients. Instead, TaxCaddy integrates with UltraTax CS and GoSystem Tax RS to generate engagement letters, tailored questionnaires, and custom document request lists with a few clicks. Taxpayers can respond from the browser or from any device with the TaxCaddy app for iOS and Android.



#### 2. Prepare

Thanks to TaxCaddy, preparers receive taxpayer questionnaire answers and documents earlier in the tax season. Since preparation can start earlier, workload compression is minimized. Preparers use 1040SCAN to automate workpaper organization and reduce or eliminate data entry into UltraTax CS and GoSystem Tax RS. Once the workpapers are prepared in SPbinder, they're assigned to the reviewer.





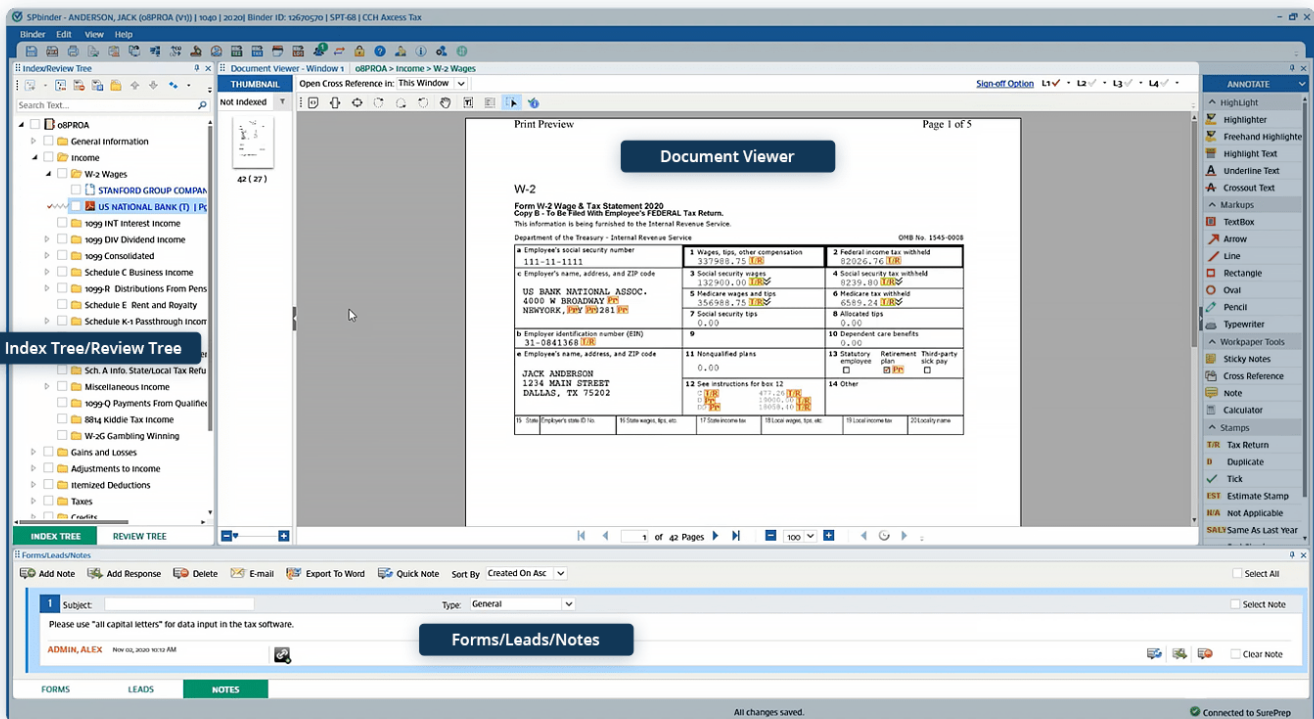
### 3. Review

Because tax workpapers are in SPbinder, review is lightning fast. The workpaper organization and annotations are standardized. Hyperlinked cross-references give reviewers a one-click path between final amounts and source documents. The team can easily collaborate in note threads. Change tracking and multi-level sign outs make it easy for reviewers to see where they left off and what's changed since the binder was last opened.



### 4. Deliver

After the review is complete, administrators upload the finalized return, 8879, payment vouchers, and invoice to the client's TaxCaddy account. The taxpayer reviews their return, provides e-file authorization, and pays the invoice without leaving TaxCaddy. They can even use TaxCaddy to make federal and state tax payments.



Contact us today to learn more about SurePrep's solutions and the compelling integration with UltraTax CS and GoSystem Tax RS: **800-968-8900**

