

TaxCaddy vs. CCH Client Collaboration

Feature	TaxCaddy	CCH Client Collaboration*
Taxpayer iOS/Android mobile phone & tablet apps	✓	✗
Taxpayer can photostan & upload docs ^[1]	✓	✗
Tax professional iOS/Android mobile phone & tablet apps	✓	✗
Supports fillable PDFs	✓	✗
One click delivery for tax returns, vouchers, e-file authorizations	✓	✗
Taxpayer can upload docs for current year and following year ^[2]	✓	✗
E-Signatures for any document type ^[3]	✓	✗
Documents can be automatically retrieved and categorized ^[4]	✓	✗
Custom branding to match your firm's style	✓	✗
Taxpayers can make payments to Fed/State/Local tax authorities	✓	✗
Documents can be uploaded for taxpayer review	✓	✗
Integrated with SafeSend Returns	✓	✗
RESTful API available	✓	✗
Integrates with CCH Axxess Tax, ProSystem fx Tax, GoSystem Tax RS, Lacerte, UltraTax CS	✓	✗

Feature	TaxCaddy	CCH Client Collaboration*
Collaborative, document-linked message threads ^[5]	✓	✗
Flexible status indicators (Done Uploading) ^[6]	✓	✗
Notes/Messages can be converted to PDF and managed with the rest of the tax documents	✓	✗
Both taxpayer and spouse can have access	✓	✗
Taxpayers can keep their account forever ^[7]	✓	✗
Taxpayer can give financial advisor and/or assistant access to the account	✓	✗
Activity Feed	✓	✗
Accessible/Color Vision Deficiency/Dark Mode	✓	✗

“It was so easy to take photos of all of the documents to send on. TaxCaddy saved me a tremendous amount of time. Made tax season less stressful!”

1. Using the TaxCaddy app for iPhone or Android, taxpayers can photoscan and securely upload paper documents as soon as they're received.
2. Instead of waiting until January to upload requested documents, taxpayers can upload documents as they're received throughout the year. In CCH Client Collaboration, documents can only be uploaded once preparation begins.
3. TaxCaddy includes two types of e-signatures: simple e-signature for documents like engagement letters and e-signature with ID verification for documents like form 8879.
4. TaxCaddy links with over 300 financial institutions to automatically retrieve documents the day they are issued. When retrieved, the documents are automatically categorized and removed from the document request list.
5. TaxCaddy messages can be linked to documents for context and easy navigation. CCH Client Collaboration messages are not linked to documents.
6. When the "Done Uploading" feature is used, taxpayers still have the ability to add documents and update their questionnaire, if necessary.
7. TaxCaddy maximizes adoption by giving taxpayers ownership of their accounts. Unlike portals, TaxCaddy is a longterm document storage solution for taxpayers.

* Based on all public documentation as of 9/24/20

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