

TAX CADDY INSTRUCTIONS

January 2021

Thank you for accepting our invitation to our new client collaboration platform, TaxCaddy. Please follow these steps to ensure your TaxCaddy account is properly setup.

1. CONNECT

Log in to your TaxCaddy account, navigate to the Overview screen, and click the Accept Connection button to establish a connection with our firm. [Learn more about connecting.](#)

2. ADD AUTHORIZED USERS

To provide access to your spouse or others, click your name in the top right corner and then Settings. Click Additional User Account and enter their information. They will receive an invitation email to create a linked account with the same steps you have already completed. [Learn more about adding users.](#)

Please note that when it comes time to electronically sign your e-file authorization, if you are “married filing jointly,” then your spouse can sign documents using your TaxCaddy account or they can create their own. If your spouse opted to create their own account, then you must link their TaxCaddy account to yours in order for them to apply their electronic signature. [Learn more about e-signatures.](#)

3. DOWNLOAD & USE THE TAXCADDY MOBILE APP

The TaxCaddy mobile app can be downloaded from the iTunes App Store or Google Play. It provides a convenient way to access your information and communicate with us directly from your mobile phone. [Learn more about the TaxCaddy mobile app.](#)

4. PROVIDE YOUR TAX INFORMATION

In your TaxCaddy account you'll find a Tax Questionnaire and a Document Request List.

1. UPLOAD DOCUMENTS

- a. Setting up "Smart Links" with your financial institutions to automatically retrieve tax documents. As documents become available, they will be automatically retrieved and placed in your TaxCaddy account. [Learn more about Smart Links](#)
- b. Photo scanning the document with the TaxCaddy mobile app.
- c. Uploading files.
- d. Manually entering form information. [Learn more about documents](#)

2. COMPLETE THE QUESTIONNAIRE

Provide answers to the Questionnaire by navigating to the TaxCaddy Questionnaire. [Learn more about the questionnaire.](#)

3. SEND & RECEIVE MESSAGES

Ask questions and provide answers in TaxCaddy's Messages tab, found on the navigation bar, to ensure we have the information we need to prepare your return. [Learn more about messages.](#)

TECHNICAL SUPPORT

If you have technical questions about your TaxCaddy account or you're experiencing trouble accessing your account (e.g., if you forgot your password), the TaxCaddy support team is just an email away. [Learn more about getting help.](#)

For technical support and troubleshooting assistance, click on Help Center at the top of taxcaddy.com, or email support@taxcaddy.com.

CONTACT LUMSDEN McCORMICK

We're excited about this powerful solution and we think you will be, too. Please don't hesitate to reach out to us if you have questions, contact [Sandy Fantauzzo](#) with questions.