

5 Tips to Simplify Tax Time

April 15 always seems to sneak up, and surely this year will be no different. While there's no escaping the tax deadline, this year will be the easiest tax season ever. Use the following tips to streamline the tax return process and minimize stress.

1. Review and complete the tax organizer. The organizer provides you with your prior year information and helps your tax professional gather valuable information about you that may impact your tax return.
2. Provide electronic documents whenever possible. The electronic tax documents obtained directly from your banks and brokerages are high quality and easy to read, which minimizes errors.
3. Respond to communications from your tax professional as quickly as possible. Often our questions just require a short answer to finalize the preparation of your tax return.
4. Review your prepared tax return as soon as it's available so that any necessary corrections can be made well before the April 15 filing deadline. If no corrections are needed, sign the e-file authorization to complete the process.

The four tips outlined above are suggestions we've made for years. They help streamline the process for you and your tax professional. With your help, we can focus on maximizing valuable tax deductions. The fifth tip makes the first four tips a breeze.

5. Sign up for your free TaxCaddy account.

TaxCaddy makes it easier than ever to gather your 1040 tax documents and deliver them to us, communicate with us, answer your questionnaire electronically, and sign documents like the e-file authorization. We're excited about this powerful, free solution and we think you will be, too.

Soon you'll receive an email inviting you to create your TaxCaddy account. Once you receive the invitation, follow the instructions in the email to sign up, connect, and get started. To ensure you're ready to go, we have the following tips and instructions.

1. **CONNECT** – Please be sure to click the Accept Connection button on the Overview screen to establish the connection with us. For more information [visit the TaxCaddy Help Center](#).
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 to create a linked account with the same steps you have already completed. For more information [visit the TaxCaddy Help Center](#).

- a. Please note that when it comes time to electronically sign your e-file authorization, if you are “married filing jointly” your spouse will need their own, linked TaxCaddy account so they can also apply their electronic signature, as required by the IRS.
3. SET UP “SMART LINKS” – Take advantage of TaxCaddy’s ability to automatically download tax documents from your banks and other financial institutions by setting up Smart Links. As documents such as your 1099 are posted they will be automatically retrieved and placed in your Taxcaddy account. For more information [visit the TaxCaddy Help Center](#).
4. USE THE MOBILE APP – TaxCaddy’s mobile app provides a convenient way to access your information and communicate with us directly from your mobile phone. You can even photo-scan paper documents and upload them to your TaxCaddy account. Download the app from the iTunes App Store or on Google Play. For more information [visit the TaxCaddy Help Center](#).
5. PROVIDE YOUR TAX INFORMATION – Early in the new year, we will send you a Tax Questionnaire and a Document Request List. Upload the listed tax documents as you receive them and answer the questions to ensure we have the information we need to prepare your return. If you have any questions throughout the process, send us a message from the Messages tab on the navigation bar. For more information about the Questionnaire [visit the TaxCaddy Help Center](#). For more information about Documents [visit the TaxCaddy Help Center](#). For more information about Messages [visit the TaxCaddy Help Center](#).
 - b. Traditional Organizer – If you would like a paper organizer as an additional reference, please let us know and we will provide one to you.
6. 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. For more information about getting help [visit the TaxCaddy Help Center](#).

We’re excited about this powerful, free solution and we think you will be, too. Please don’t hesitate to reach out to us if you have questions. Samantha Karcher from our office can help answer any questions or concerns you may have and can be reached at 724-934-4880 ext. 359 or Samantha.Karcher@ThinkHolsinger.com.

Regards,

Holsinger, P.C.