

# 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 using your PC, Apple, or Android device. Following is a getting started overview.

Learn more at [taxcaddy.com](https://taxcaddy.com). For detailed instructions on getting started visit the [Help Center](#).

## 1 Sign Up

You will receive a TaxCaddy invitation email from [NoReply@TaxCaddy.com](mailto:NoReply@TaxCaddy.com). Please check your spam folder. 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 Preparer 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 financial institutions and let TaxCaddy automatically retrieve your tax documents, such as 1099s, 1098s and W-2s. Install the TaxCaddy app for your Apple or Android device to take photographs of paper documents as you receive them.

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If you have a question or would like further information, please contact Samantha Karcher at (724) 934-4880 ext. 359 or [samantha.karcher@thinkholsinger.com](mailto:samantha.karcher@thinkholsinger.com)

