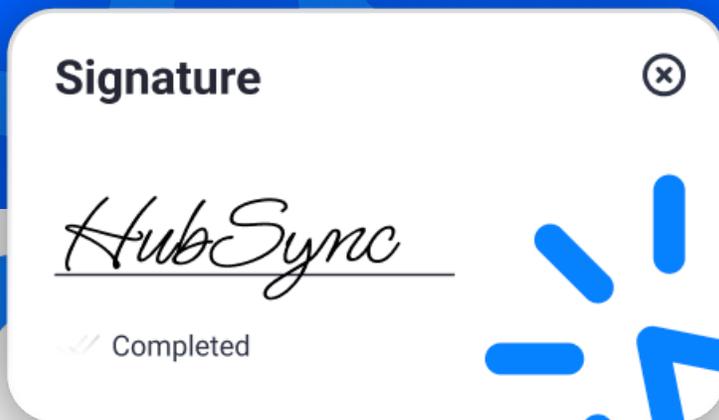


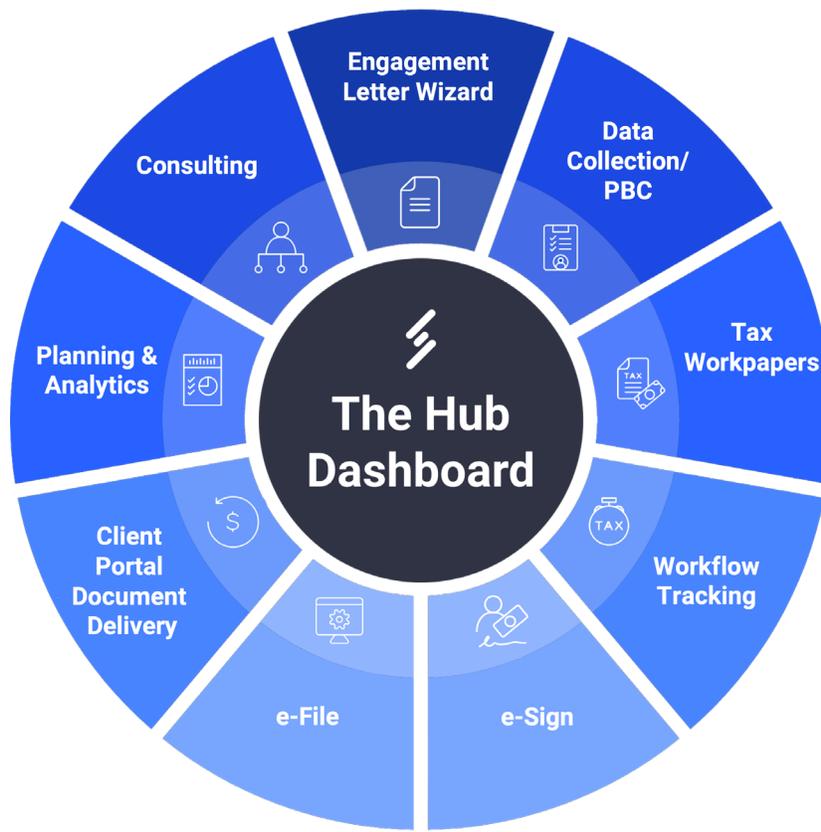


REVOLUTIONIZE YOUR CLIENT EXPERIENCE.
CONSOLIDATE YOUR POINT SOLUTIONS.



**Tired of the chaos
caused by using too
many platforms for
your CPA firm?**

**HubSync is the
all-in-one solution
you've been
looking for.**



Introduction

Our platform is designed by industry veterans to streamline your workflow and keep everything organized in one intuitive place.

With HubSync, you can:

Manage all of your client work in a single platform:

No more jumping between different apps and programs. HubSync gives you everything you need to manage your clients, from document sharing and communication to task management and reporting.

Boost your productivity:

Our intuitive interface makes it easy to find what you need quickly and efficiently. You'll save time and effort, so you can focus on what matters most - growing your business.

Improve collaboration:

HubSync makes it easy to collaborate with your team and clients in real time. Share documents, have discussions, and track progress, all in one place.

Impress your clients:

HubSync's professional interface will help you make a great impression on your clients. They'll appreciate the ease of use and the ability to access their information securely online.

HubSync is the only platform you need to take your CPA firm to the next level.

Streamline Your CPA Workflow

Feeling overwhelmed by managing multiple platforms and juggling tasks? HubSync, your veteran CPA partner, brings order to the chaos. Imagine:

01. *One Centralized Platform*

Eliminate jumping between disparate platforms. HubSync seamlessly integrates your engagement letters, client communication, reporting, and collaboration tools.

Gateway - a mission control with the CPA firm offering a consolidated view with real time status updates

Engagement Letter - Create, route, deliver & track thousands of engagement letters, or any document type with a few clicks.

Client File Sharing - Collaborate electronically with clients across all services in a secure, online portal.

Document Management System (DMS) - One place for document storage, retrieval, sharing, and collaboration tailored to the unique needs and workflow of accounting professionals in a secure, and intuitive document management solution. Coming 2025.

02. *Effortless Efficiency*

Boost your productivity with HubSync's intuitive interface. Automate tasks, generate reports, and manage your workflow with unparalleled efficiency.

Tax Return Breakup (TRB) & Delivery - Instant break up of tax returns per firm rules. You choose by filing type, filing method, vouchers, K-1s, etc., with delivery directly to the client.

eSign - deliver e-signatures, including KBA, with global tracking.

eFile - full transparency into the status of uploaded and/or transmitted returns in real time and in conjunction with HubSync's Return Delivery & E-Sign module, firms can automate the release of returns upon receipt of the signed e-file authorization forms.

Batch Extensions - prepare batch extensions ahead of the deadlines to alleviate time and constraints close to the deadline, saving countless hours and money.

Workpapers - provide a game changing Trial Balance mapping experience with Machine Learning that supplants current software as mapping tool.

03. *Enhanced Collaboration*

Foster closer client relationships with seamless communication. HubSync facilitates secure discussions, file sharing, and real-time updates, keeping everyone in the loop.

Tax Organizer - bulk delivery to all individual clients providing a questionnaire and integrated document request list.

Prepared By Client (PBC) - for entity or audit clients, provide PBC list to 1 client or to thousands with a click of a button. Manage assignments, deadlines of requests, and message back and forth between the client to complete any engagement.

Workflow Tracking - visibility into all engagement project statuses, assignments, deadlines, and more. With bi-directional integration capabilities, changes made in HubSync are reflected in the workflow tool.

Surveys - create and deliver your own surveys from all things internal to client acceptance and onboarding, the possibilities are endless.

04. *Peace of Mind*

HubSync prioritizes security and data protection. Rest assured knowing your client information is securely stored and encrypted.

Planning and Analytics - provide real-time insights into key metrics across the entire firm with visuals, filters, drill down capabilities and more. Provide next level service with client facing dashboards setting your firm apart from others.

R&D Tax Credits - streamline the collection organization, and submission of R&D tax credit data to support taxpayer claims sent to the IRS for processing.

Tax Controversy - manage all tax controversy case types such as Notices, Appeals, and PLRs from within HubSync. Real-time views into status, assignments, and deadlines.

A firm's advantage used to be the value & expertise they brought to their clients. Today, technology has eroded this advantage. Outdated & fragmented systems is frustrating for professionals and their clients. Technology now dictates who comes out on top.

HubSync is not just software, it's your trusted partner in the ever-evolving world of tax and accounting. Embrace the future of your firm's success. Choose HubSync.

Your Complete Solution

Our modular solution set solves firms biggest problems for Tax, Audit and Accounting practices.

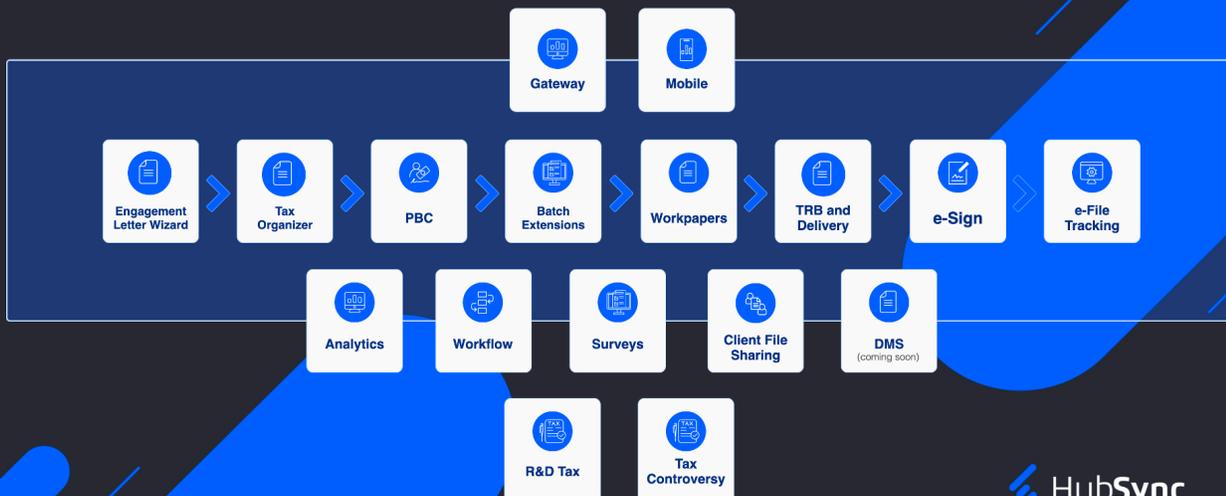
Firms are working hard to provide a full range of services to their clients and HubSync is the firm's preferred partner to provide a single platform to collaborate in a single solution for client interaction.

HubSync supports the entire process from Engagement Letters, requesting information, automating preparation steps needed to complete the engagement, sending final deliverables, collecting e-signatures on consent forms to tracking the progress of every step at a global view via Analytics.

As firms work with their clients to provide expertise across tax, audit, client accounting services, and consulting, HubSync works to ensure client experience is of top priority. No more logging in to disparate systems to interact.

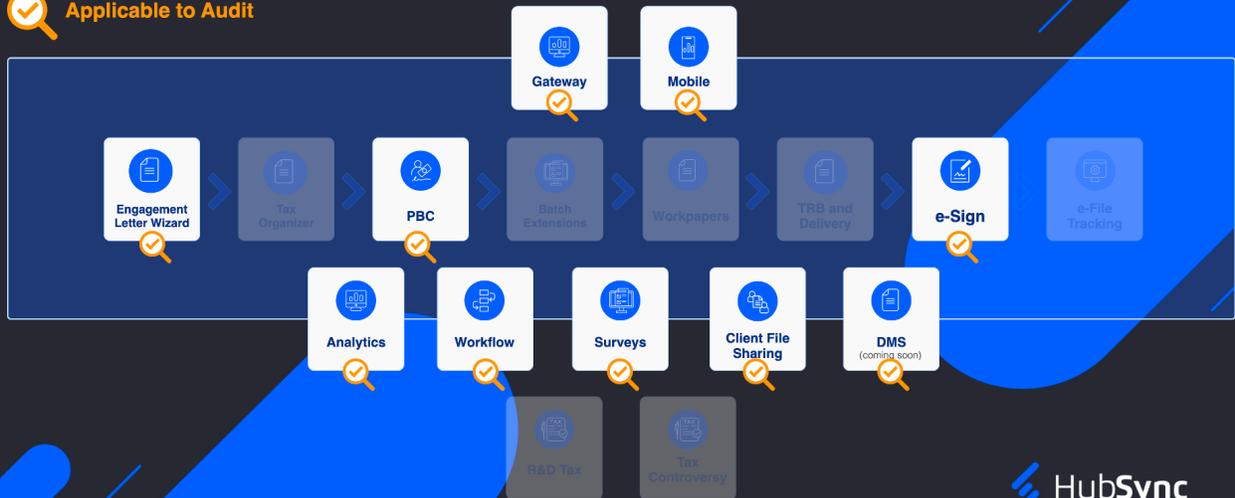
As a result, firms see an increase in technology adoption and ROI savings with process efficiency and time spent on manual tasks. Ultimately, freeing up firm professionals to focus on what matters most.

The HubSync Platform



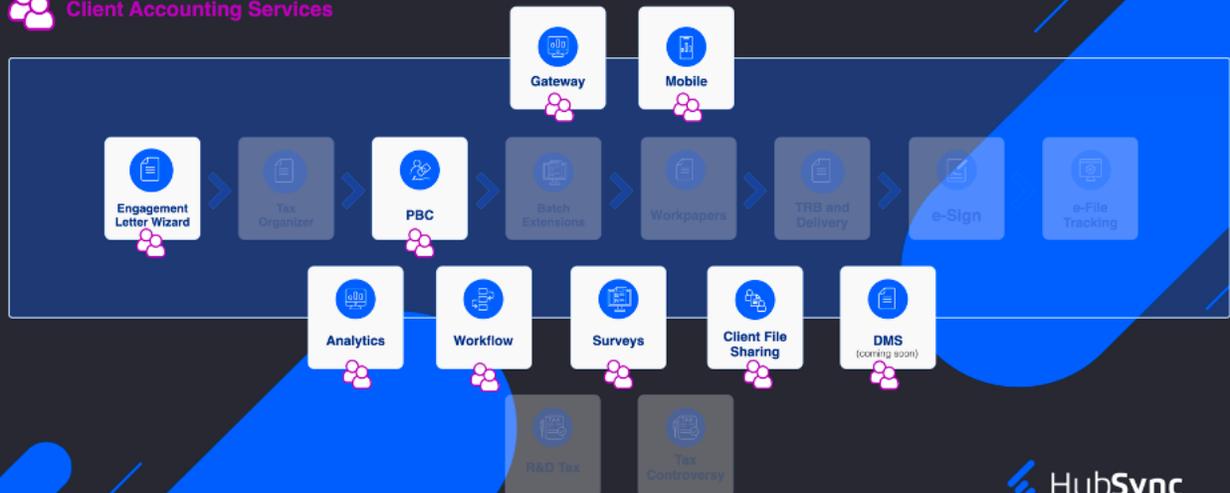
The HubSync Platform

 **Applicable to Audit**



The HubSync Platform

 **Client Accounting Services**





John McGowan
Founder & CEO



At HubSync, we believe in harnessing the power of technology to empower your business. . That's why we're committed to relentless innovation. We don't just develop solutions - we listen actively to our clients' needs and act on their feedback with lightning speed. Our agile development process allows us to implement cutting-edge features and address your challenges at an unmatched pace. With HubSync, you'll always have the tools you need to stay ahead of the curve and deliver exceptional service to your clients.



Company Overview

Led by Founder and CEO John McGowan with over 25 years at the Big 4 and based in Franklin, TN, HubSync is a cutting-edge tax and accounting technology platform founded by a team of veteran professionals who are passionate about modernizing accounting technology.

Frustrated with the limitations of traditional tax & accounting preparation systems, the HubSync team has reimagined the experience from the "outside in" for clients and the "inside out" to dramatically improve CPA productivity.

HubSync's platform automates, streamlines and revolutionizes the work and client experience you deliver. Our AI-powered solution, is the one-stop shop where CPA's get work done.

HubSync is committed to providing the highest level of security for our clients and their data.

As part of this commitment, we have achieved General Data Protection Regulation (GDPR) and System and Organization Controls (SOC2) compliances, a rigorous third-party audit of our controls and processes related to Security, Availability, and Confidentiality.

