HubSync TAX ORGANIZER

Features Include:

- Gathers 1040 data from clients
- Provides a document request list based on prior year return data via Integration with the tax preparation software
- Provides a smooth experience for clients to upload tax documents
- A tailored questionnaire guides the process and personalizes the organizer to what is
- Ability to quickly view the data as it is collected from clients with the ability to track
- All documents collected are stored automatically in HubSync for easy retrieval

How does HubSync prepare the Document Request List?

HubSync integrates with the tax preparation software to pull a list of documents the client had in the previous year. The document request list serves as a checklist for the client with the ability to mark documents as applicable or not applicable to the current tax year.

Uploaded documents are checked off so that both the clients and the CPA firm can track and manage the client's progress.

Can tax organizers be created in batch?

Yes, the CPA firm can choose to create tax organizers in bulk or individually.

Can the client message me through HubSync?

Yes, HubSync has messaging capabilities so that the firm and client can correspond directly from within the platform. The users are able to @mention or tag certain users so that they are instantly notified when a new message has been sent.

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Does the tax organizer handle foreign tax information?

Yes, if the client had foreign related transactions (e.g., foreign bank accounts, foreign trust, foreign estates…etc.), they will receive a foreign questionnaire with the ability to enter data related to those specific transactions.

What does the process look like for the client to complete the organizer?

The client logs in to HubSync and is prompted to answer a brief questionnaire, upload documents based on the document request list generated from the tax software.

From there, the clients are prompted to complete sections that apply to them personally. For example, if the client had rental or royalty income in the previous year, they can enter detail pertaining to the rental (e.g., income and expenses).

How do I know if my client has started their organizer or uploaded any documents?

HubSync has many notification preferences to choose from. Users can choose if they would like to be notified of organizer activity and/or document uploads instantly or in a daily digest email. Or users can disable their notifications and track activity from directly within HubSync's activity dashboard.

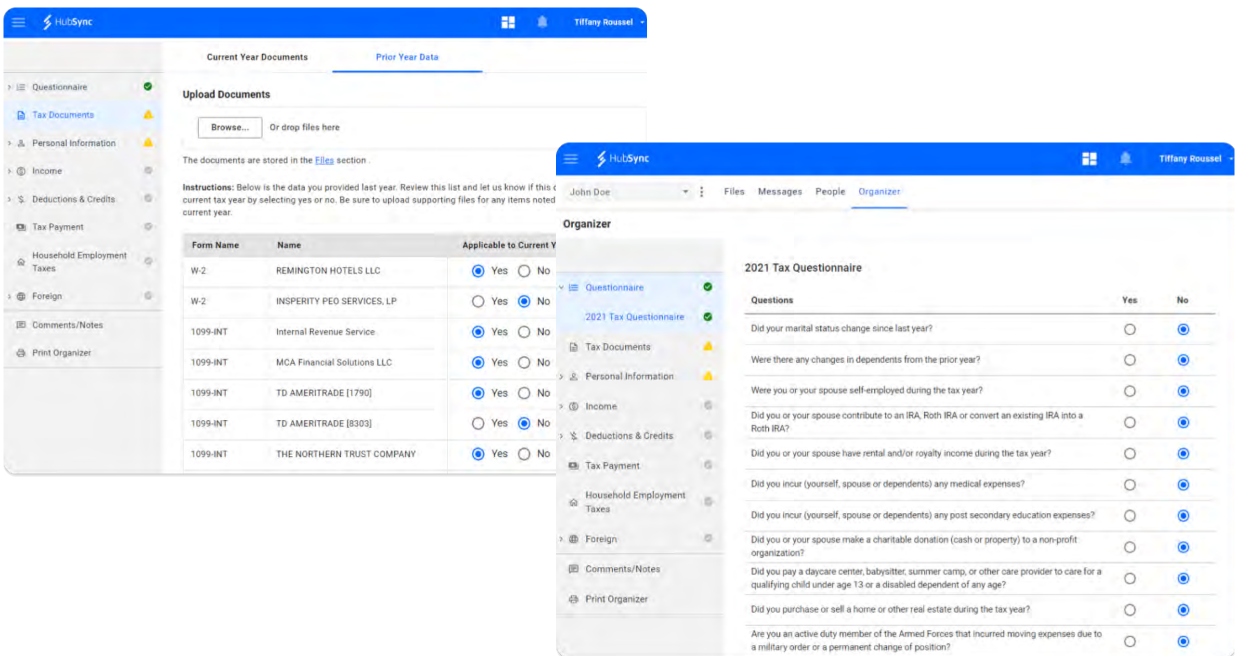
Can the firm monitor the progress of all tax organizers in the firm?

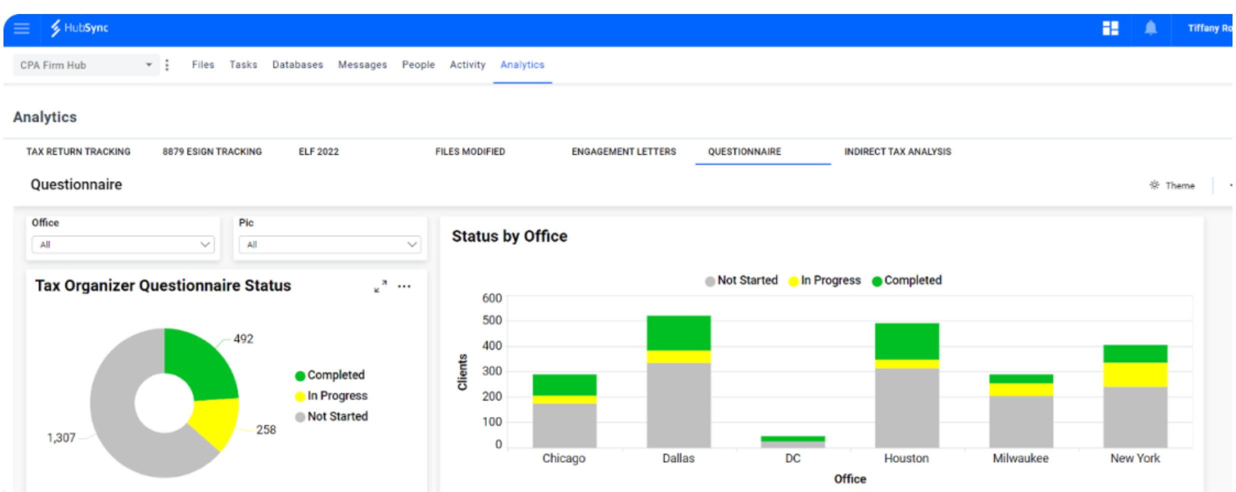
Yes, with HubSync's real-time dashboards. Below are simply a few examples of metrics able to be provided. Each of these data points can be filtered by firm demographics such as region, office, partner, client…etc.

HubSync

TAX ORGANIZER

- Status of organizers (not started, in progress, complete)
- Number and/or percentage of documents uploaded compared to total requested
- Submitted or complete organizers with detail such as the date the organizer was completed





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