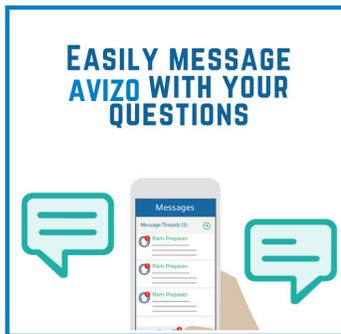


# TAXCADDY

TaxCaddy is a secure portal where you can send in your tax documents. Instead of sifting through a huge paper organizer, you'll see a list of items to give us. You can easily scan or just take photos of your documents as you receive them. TaxCaddy makes getting filed faster and easier than ever!

**GET YOUR INVITATION TODAY! CALL 251-928-2443**



## What our clients say...

"TaxCaddy is very convenient. I could upload forms as soon as I got them instead of putting it off and working on it all at one time."

"TaxCaddy was easy to use."

"TaxCaddy really made tax time a lot easier. It seemed to make tax time less stressful."

"Uploading the documents and letting the accounting folks figure out where everything went was much less stressful! Hope Avizo keeps using it. Much simpler for me as the taxpayer."



Secure Account



Use computer, smartphone, or tablet



Keep all documents in 1 place



Easily view & add documents



Makes filing your taxes easier for YOU

# IRS

## Recommendations

# TAXCADDY

## Features

Taxpayers should develop a system to keep all their important information together. They can use a software program for electronic recordkeeping.



TaxCaddy IS an electronic recordkeeping system.

Bonus: it's extremely secure AND it's free for Avizo clients to use!

Throughout the year, taxpayers should add tax records to their files as they receive them. Having records readily at hand makes preparing a tax return easier.



Download the app. Each time a new document comes in, open the app & take a picture of it. TaxCaddy saves it as a PDF. You can shred the paper instead of storing it in a drawer somewhere.

In general, taxpayers should keep their documents for 3 years from the date they file the return.



Your files AND your tax returns are easily accessible and securely saved for as long as you want.

Taxpayers should prepare for natural disasters such as floods, wildfires, & hurricanes by keeping tax documents in a safe place. Tax docs/returns, bank statements, & even insurance policies should be stored digitally & not only on paper.



Keep any and all important documents in TaxCaddy. You can securely access them anywhere and at any time.