

[WEBINAR] Announcing The Next Generation Scan-and-Populate: 100% Accuracy, No Human Verification

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TALK TO SALES



The most **productive** 1040 tax automation solution on the market.

SurePrep delivers seamless integration with your existing tax software to automate and streamline the entire 1040 process for both the taxpayer and tax professional.

CPA Practice Advisor
TECHNOLOGY INNOVATION
AWARD FINALIST

TALK TO SALES

The SurePrep Tax

Process

Your firm is ready for 1040 automation. Are you?

SurePrep makes your tax practice more productive and profitable. We are the leader in 1040 automation for CPA firms. Our solutions are not secondary products in a tax software suite—they're our primary focus. That's why our scan-and-populate software automates the processing of three to five times as many documents as our competitors and streamlines the collection of those documents with solutions your clients will use and love.

The combination of TaxCaddy, 1040SCAN and SPbinder allows you to get more work done in less time while improving client service.



Increase your 1040 productivity

SurePrep's 1040 tax automation software helps you streamline your workflow, increase client satisfaction and saves you time so you can focus on higher value services.

TaxCaddy

Eliminate the paper organizer



Convenient, mobile solution your clients will love and your staff will appreciate.

POPULAR FEATURES

- Automated Document Request List
- E-Signature w/ KBA for 8879
- Client app for iPhone and Android

TAXCADDY

1040SCAN

Automate preparation



Industry-leading scan-and-populate solution to automate 3-5x as many documents.

POPULAR FEATURES

- Auto-verification for Native PDFs
- Identify missing source documents
- Prevent duplicate data from exporting

1040SCAN

SPbinder

Streamline review



Save reviewer time with automated, standardized workpapers.

POPULAR FEATURES

- Top-down review
- Cross-references across all file types
- 4 levels of sign-offs

SPBINDER

Solid, safe, and secure

Trusted by some of the largest CPA firms in the world



SurePrep leverages Microsoft's Azure infrastructure to ensure data security through encrypted

communications, threat management and mitigation practices, including regular penetration testing.



SurePrep uses Amazon Web Services for secure, reliable storage. Your documents are encrypted in transit and at rest using Amazon's best-in-class Secure Socket Layer and Server Side Encryption technologies.



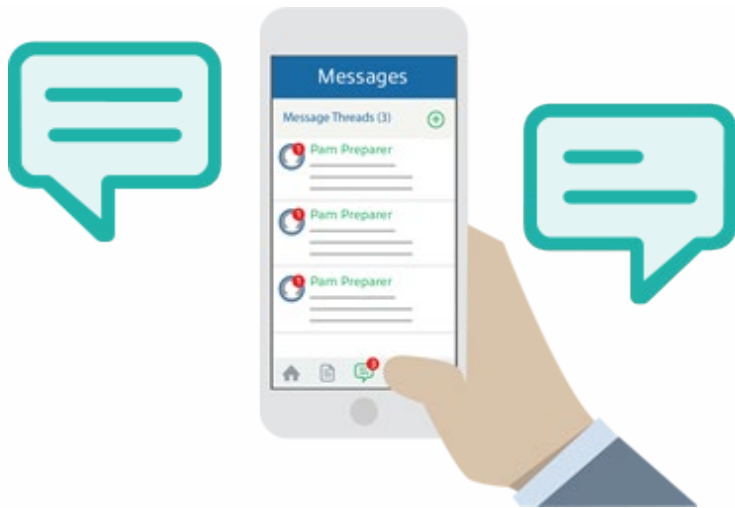
SurePrep has been independently audited, tested and validated by C-Level Security, LLC. The C-Level Certified Seal verifies that TaxCaddy employs the strictest security steps for safeguarding your data.

Choose the 1040 tax return automation software that increases productivity

“How can my firm become more efficient?” That’s a question we often hear, both from accounting firms who still use paper-based processes and firms on the cutting edge looking to optimize. Here's our solution:

Seamless collaboration with clients

Your clients want convenient, mobile options



that the paper organizer doesn't deliver. Our award-winning 1040 solution, [TaxCaddy](#), automatically retrieves documents like W-2s and 1099s, enables e-signatures, provides in-app messaging and a user-friendly design that facilitates easy collaboration between you and your clients!

Eliminate data entry into your tax software

[1040SCAN](#)'s industry-leading Optical Character Recognition (OCR) automates **3x-5x** as many documents as the competition. Now, with our new patent-pending technology for autoverification, you can even eliminate human verification for native PDFs.

[1040SCAN](#) compares the traditional OCR to the native PDF text layer. When the two layers match, the document is automatically verified with 100% accuracy – technology no other vendor offers.

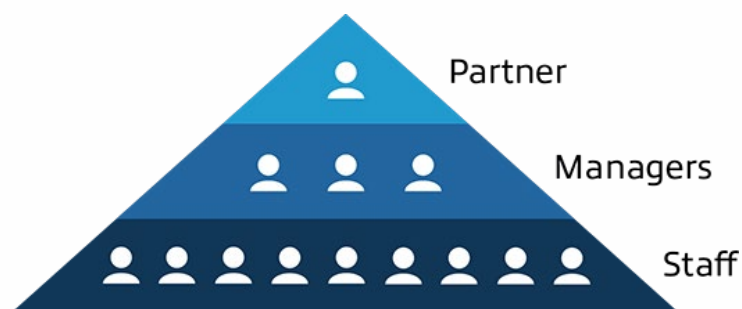
100% Accuracy. No human verification.



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Increase leverage with streamlined tax workpaper review

Think back to your days as a tax preparer. What workpaper preparation standards did you follow? Did you organize and index workpapers in a consistent manner? Did you use tickmarks and calculator tapes to show the work performed? Did you cross-reference amounts to show where they were coming from (or going to)?



You likely did these things because they enabled a fast review. Reducing review time is the key to maximizing leverage and profits. Our award-winning workpaper system, SPbinder, provides standardization that facilitates the most efficient, paperless review possible.

You're in good hands with the experts in 1040 tax automation

We've been helping customers implement new technologies since 2002 and we continue to perfect our implementation methodology today. To ensure a successful implementation, we will work with "champions" at your firm to customize a training and implementation plan.

Join 2 of the Big 4, 5 of the Top 10, almost half of the Top 100, and 100s of small to mid-sized firms who have automated their 1040 workflow with SurePrep.



SurePrep is a preferred partner of the following professional associations





Webinars



Increase Profits & Client Satisfaction

What if you had access to your clients' source documents the day they were issued from more than 300 banks, brokerages and payroll service providers? And what if the data exported directly to your existing tax software? Attend this webinar to learn how to increase 1040 profitability, and boost client satisfaction.

[LEARN MORE](#)

Success Stories



Cottrill, Arbutina & Associates PC

We spoke with Joe Bevevino, CPA, Vice President & Shareholder at Cottrill, Arbutina & Associates PC. The firm is a full-service tax, accounting, and business advisory firm with approximately 35 full-time and 10 part-time employees based in Beaver, PA. They use UltraTax, 1040SCAN PRO, 1040SCAN ORGANIZE and SPbinder.

[READ STORY](#)

WhitePapers



Boomer Guide to Simplifying Tax Time

Today, there is a new solution that simplifies tax time for both accounting firms and their clients. [TaxCaddy](#), SurePrep's multiple award-winning 1040 productivity solution, allows taxpayers to answer organizer questions, upload documents, and snap pictures of documents with TaxCaddy app for iPhone and Android.

[READ WHITEPAPER](#)

Have questions about our software and services?

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