STEVENS GROUP
CPAs & WEALTH COACHES

Dear Client:

Thank you for reaching out about the Tax Caddy implementation with your questions and concerns. I wanted to provide a little bit more background on the software and how our office will operate moving forward.

First, we will always be looking for ways to keep our costs to clients down, and one of the most effective ways to do that is through technology. So, you should expect an ever-evolving process to incorporate new technology and processes as they develop and become available.

If you do not like technology that is ok too. However, we need you to understand the cost of salaries and manual work. The more manual work we do, the more expensive it is for our clients for us to do that work. So, by embracing these changes, Tax Caddy, and other software, it enables us to keep your bill steady and/or lower as compared to a completely manual process by salaried employees.

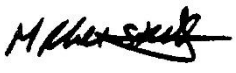
Tax Caddy® is a software that belongs to YOU. Even if you want to go with a new CPA in the future; the Tax Caddy set up and account is yours, and you control it. It does not belong to Stevens Group; we just facilitated the setting up for you. This software replaces the old paper mailout organizer and the emailed PDF organizer. It has the questionnaire and placeholders for all the prior year documents you had so you can upload the current year's documents. It shows your progress on your uploads, what you are missing, etc. In the past clients would email us documents or upload them through ShareFile, and neither of those methods provided verification that the documents made it into our system. With Tax Caddy, you can verify that your documents were received and access copies of what was uploaded.

With that in mind, you have two options for providing tax information:

- We highly encourage the use of Tax Caddy for efficiency, costs, and verification purposes on the client's side. It is not a requirement that you use it at this time, but at some point, in the future it most likely will be a requirement.
- If you insist on the old manual methods, we can send you a "Jane Doe" PDF organizer for you to fill out, and you can submit your documents how you historically have. But please note, this requires more manual labor on your account for us to receive the information and get it into our system. We track our time and efforts spent on each client and thus you may see an increase in your annual billing if we do more manual labor on your account.

If you need assistance using Tax Caddy or a new invitation sent to you, please let us know. We appreciate your business and look forward to working with you for years to come.

Sincerely,



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