

Getting started is as easy as 1, 2, 3

TaxCaddy is an exciting new solution that simplifies tax time by allowing you to collaborate with UHY more easily than ever before.

Learn more at taxcaddy.com. For detailed instructions on getting started visit the [Help Center](#).

1 Sign Up

You will receive a TaxCaddy invitation email from UHY. From the email, click the Sign Up Free button. Create a password, select your three security questions and follow the steps to create your TaxCaddy account.

2 Connect

Log in to your TaxCaddy account and accept UHY's connection request. Accepting the connection request allows your tax professional to send you messages and requests and see your tax documents.

3 Begin

Your spouse or a financial advisor can be added as an additional user and granted access to your TaxCaddy account at any time. Link your bank and brokerage accounts and let TaxCaddy automatically retrieve your tax documents. Install the TaxCaddy app for iPhone or Android to take photographs of paper documents as you receive them.