

Using M&S TaxCaddy™ for your individual tax returns

Let's make tax season easier

Last year, we introduced a simpler way of filing your taxes remotely called M&S TaxCaddy. Read on to learn more about the simple steps you can take to begin using this software or to get help signing up.

With M&S TaxCaddy you can complete the entire tax process - from your tax organizer, to uploading your documents and electronically signing your return - all from the safety of your home with your computer, tablet or phone.

TaxCaddy 101

- Receive and sign your tax organizer and engagement letter electronically at the beginning of tax season
- View your tax returns progress, track your tax document status and review pending items in real time
- Send a message to your M&S advisor via the program's messaging system, from your PC, phone or tablet
- Submit documents by uploading or scanning them from your PC, snapping pictures on your phone or entering manually
- Receive final returns electronically via SafeSend Returns. Once reviewed and signed, these will transfer to TaxCaddy
- Receive email reminders for estimated tax payments, and utilize TaxCaddy to keep this information organized

M&S TaxCaddy™ Resource Center



Visit our resource center to learn more!

For questions and to sign up:

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www.msllc.com/TaxCaddy

Congratulations! You've signed up... Now what?

TaxCaddy Basics

Congratulations! You have taken the first step toward simplifying your tax filing process! Let's explore the next steps you should take and get a jump start on this year's tax process.

Once your TaxCaddy account is created, there are four basic actions for you to complete through TaxCaddy:



Sign engagement letter and complete questionnaire

- When you log in, you will see a bold button on the left hand corner prompting you to sign your engagement letter.
- Click this and add your signature. Then select the option on the left to complete your 2020 tax questionnaire. If you received an organizer in prior years, this will replace it.



Upload documents

- Next, you will upload your tax documents. You can do this by scanning them or downloading them onto your PC or taking pictures of them via your cell phone/tablet if you have downloaded the TaxCaddy app.
- To do this, select upload documents from the main menu on the home screen.



Change your status

- Once your documents are uploaded, you will navigate into the main menu and select your document request list.
- The items you have uploaded will be marked as uploaded. You can also change the status to "doesn't apply" or "already approved."
- Once you are finished, hit submit at the bottom.



E-sign your return

- After your return is prepared, the final step is to review it and sign it electronically. To do this, you will navigate to the tax return on your home screen.
- Click to open the return and review the information. You will then select "sign return" and submit the signature.
- Your tax season is now wrapped up and your return will be efiled! If any payments are due, you will receive further instructions.

TaxCaddy Advanced

TaxCaddy is your portal - and there are many ways to create a personal, seamless experience. Let's explore how you can make the most of this tool.

Set Up Smartlinks



Rather than uploading each document as you receive it in the mail, you can set up "smart links" with your financial institutions. This allows your documents to be automatically uploaded to your TaxCaddy account when they are available, including corrected 1099s.

Keep in touch



You can use TaxCaddy to reach your tax advisor with specific questions relating to this tax year, or with planning questions when thinking ahead. Upload applicable documents, chat in your question, and track your conversations all in one place to easily access it whenever and wherever you need it.

Track your estimates



Taxes are an all year thing - so is your TaxCaddy experience. Use TaxCaddy to track estimated payments and their due dates and print vouchers. SafeSend Returns will even take you exactly where you need to go to make payments electronically, if applicable.

If you also file business and trust returns, this is for you.



TaxCaddy & SafeSend Returns

If you file multiple returns with us, including business and trust tax returns, these will be available to review and e-sign via SafeSend Returns. You are also able to manage your Schedule K-1 distributions.

Just like last year, you will receive an email from Mowery & Schoenfeld at noreply@safesendreturns.com. You should click the link in this email to access your returns and request an access code. You will then receive the access code to verify your identity and you can download your returns.