Introducing Taxaroo

Client Management Platform

Dear Valued Client,

To offer improved document and personal identification security, we are using a Client Management Platform – **Taxaroo**. This platform allows us to deliver an effective and efficient tax practice. Our security-first approach and desire to offer transparency in the tax preparation process is realized with this platform. Taxaroo improves our ability to communicate with you, as well as to collect, manage, prepare, and share all your documents.

To get started: After we receive your signed Engagement Letter, you will be sent an invitation to use our secure portal (activate Taxaroo). The invitation is valid for 24 hours. If you miss the window, please call or email to request a new invite. The email invites you to register by filling in basic information and creating a password. You can opt-in for Two Factor Authentication (or return to do that later), accept the terms, then **Get Started**. You will use your email and your newly created password to log in to your client portal where you can complete the Interview and start uploading documents.

A few important features/improvements we want to share:

Secure Document Portal: This is a secure, easy, professional way to work with you in the cloud. It uses LogoMarkBank-grade 256-bit AES encryption, and custom organizers for any tax return type. This format means Taxaroo is easy to access from ANY device – computer, tablet, phone. Eventually, this Portal will replace Sharefile at our firm.

Client Interview/Organizer: The Main Information Worksheet and Checklist are built into the Taxaroo Platform. In the first year, you will fill out this necessary information as part of the onboarding process. Each subsequent year, you will only need to update your information. Based on your responses, we will send you a list of tax information that is needed and will send you the applicable worksheets and Due Diligence forms for you to fill out, sign, and return to us.

Security: All communication and document storage is encrypted. 2-factor authentication is now available (and recommended).

Document Management: A separate section in Taxaroo allows you to clearly see what documentation we are still missing, and we will be able to see what and when you have uploaded documents.

Progress Tracking: You will be able to see within Taxaroo when we have started working on your file. No more emails or phone calls to get a status update.

Text Messaging: When you provide us with your cell phone, we will be able to send you text messages, you can text your reply, and we will both be able to track the message threads. This will not replace Verifyle, though eventually, tax-related emails will also move to this platform (expected for 2022).

Video Call: Video calls will be available in this platform.

Appointment Scheduler (coming soon): You can schedule phone/video appointments from within Taxaroo.

Invoice Tracking (coming soon): You will have the ability to track the status of your invoices and payments. Currently, we do not accept credit cards but are investigating this as a future option.

IRS-Compliant Electronic Signatures: Taxaroo's e-signature functionality maintains a high level of security and is compliant with IRS Publication 1345 to keep your Signature documents safe. For clients who have already sent us copies of their Driver's License and SS card, and with whom we have already established a business relationship, the IRS has implemented an even more streamlined approach to identity verification. This will be especially helpful for our military and international clients. For new clients, we will be using strict Knowledge Based Authentication (KBA) that pulls data from 3rd party public records for our Identity Verification requirements.

Please do not hesitate to contact us with your questions or for assistance in this transition. We want to help make this easy for you – **admin@judydoesyourtaxes.com** or **757-528-4848**.