Shoebox

# Every tax season, the same chase... there's a better way

The same secure process your clients trust with a faster, more organized intake experience

| TODAY<br>Manual coordination | | WITH SHOEBOX<br>Automated, client-specific intake |
|---|---|---|
| **EXAMPLE · GENERIC CHECKLIST**<br>☐ Income documents<br>☐ Deduction records<br>☐ Any other forms<br>Built from scratch or vague | BUILD CHECKLIST | **EXAMPLE · CLIENT RECEIVES**<br>☑ **W-2** ADP<br>☑ **1099-Consolidated** Charles Schwab<br>☑ **K-1** Acme Ventures Fund II<br>☑ **Mortgage Interest** Chase |
| Send a request that doesn't name the specific forms or sources | REQUEST & COLLECT | Client gets a **branded request** and uploads via a direct link - no new login or portal |
| Send two, three, four follow-up emails ... and still wait | Reminders | **Reminder emails go out automatically** for outstanding items |
| Piece together who's sent what from multiple places | TRACK STATUS | Shoebox **tracks what's uploaded vs. what's still missing** |
| Start the return without everything you need | HAND OFF | Preparer receives a **cleaner package, ready for review** |

Works alongside **Drake, Lacerte, UltraTax, ProSeries,** and other tax-prep platforms. Shoebox is a coordination layer, not a replacement for your existing tools.

**Curious what this would look like for one of your clients? We can show you in 20 minutes.**

**Book a 20-minute walkthrough →**

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