



# TAXCADDY FAQ

## TaxCaddy

TaxCaddy makes it easier than ever to file your 1040 taxes with Gray, Gray & Gray. How can you use this service to submit your 1040 tax preparation source files to us? This FAQ is designed to help answer some questions you may have about sending Gray, Gray & Gray your 1040 tax preparation materials and how you will be getting your return from Gray, Gray & Gray.

### What is TaxCaddy?

TaxCaddy is a safe and secure online system to help you gather and organize your 1040 tax preparation materials (1099s, 1098s, W-2s) and provide them to Gray, Gray & Gray electronically. It allows you to connect to your financial institutions and retrieve your documents automatically. You also have the option of using an app on your mobile device to upload photos of your paper documents. You can upload and store your documents safe and secure year-round.

### Is there a charge for TaxCaddy?

No. There is no additional fee for using TaxCaddy to organize your tax preparation materials.

### How do I access TaxCaddy?

If you are already connected, you will just need to login at [TaxCaddy.com](https://taxcaddy.com). You will receive an email at the email address Gray, Gray & Gray has on file for you. The email will come from “noreply@taxcaddy.com”. The subject line will be: Gray, Gray & Gray invited you to create a TaxCaddy account.

### How do I create a TaxCaddy account?

When you receive the email invitation, click the link in the email and follow the instructions to create your account. If you would like to create an account without an invitation from Gray, Gray & Gray, please follow the instructions in the [TaxCaddy Help Center](#).

### How do I know if I am successfully connected to Gray, Gray & Gray?

You should see the Gray, Gray & Gray logo in the top left of your screen when you are successfully connected.

### What is the questionnaire?

The questionnaire is a handy resource for comparing your prior year tax return source files and can assist you with identifying what information you may need to submit this year.

*For help filling out the questionnaire, visit the [TaxCaddy Help Center](#).*

### How do I upload my paper documents?

Visit the [TaxCaddy Help Center](#) for instructions.



### **How does the document retrieval from my financial institutions work, and what is the benefit of doing this?**

TaxCaddy uses industry-standard data encryption to ensure the safety of your personal information. You will use the Smart Links in TaxCaddy to link to the different financial institutions you use, and retrieve the documents. You can link to over 300 banks and financial institutions. The benefit of linking your financial institutions is that it allows your Gray, Gray & Gray tax professional to access your important tax documents quicker without any extra work for you.

### **What are Smart Links?**

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- [How to setup](#) Smart Link
- [Smart Link Security](#)

### **What if I can't link TaxCaddy to one or more of my financial institutions?**

Simply upload your document using one of the alternative methods. Let your Gray, Gray & Gray professional know that the institution was not available and we will work with them to get a Smart Link set up for the future.

### **If I need to provide a QuickBooks file, how can I do that?**

Unfortunately, TaxCaddy does not accept QuickBooks files. Instead, please provide any QuickBooks files by emailing them directly to your Gray, Gray & Gray professional.

### **Can I recover my documents from TaxCaddy in the future?**

Your TaxCaddy account is your property for your lifetime. If you ever wish to recover a document from a previous year, simply log into your TaxCaddy account and download the documents.

### **Will I still get paper copies of my documents back from Gray, Gray & Gray?**

No. Your documents will remain accessible to you in TaxCaddy at all times. You can log in to your TaxCaddy account and download any documents you may need at any time.

### **How do I add or remove a spouse or additional user account?**

You have the option to invite your spouse or another person to be an additional user on your TaxCaddy account. Adding an additional user allows them to do everything you can on your account, except sign documents, mark documents as reviewed, and access your Settings (i.e. Changing your name, email address, profile picture, password, security questions, or push notification settings). Adding an additional user as a spouse allows them to sign spouse-related documents. You can revoke an additional user's access at any time if they are not connected as a spouse user. A spouse user can delete their own account or you can [delete your account](#) and create a new TaxCaddy account.

Click [here](#) and follow the steps to add or remove an additional user account.

### **How can I go back and see the tutorial I saw when I first logged into TaxCaddy?**

To see the tutorial again, simply click on your name in the upper right corner and select "Tutorial" from the drop down menu.

### **Who do I contact if I am having trouble with TaxCaddy?**

If you have questions specific to the TaxCaddy program, please reach out to Gray, Gray & Gray's TaxCaddy expert Catherine Dwan at [cdwan@gggllp.com](mailto:cdwan@gggllp.com).

### **What should I do if I forget my TaxCaddy login information?**

If you forget your login information for TaxCaddy, simply contact the [TaxCaddy Help Center](#) for assistance.

### **What if I have questions for my Gray, Gray & Gray accountant?**

You can contact your Gray, Gray & Gray professional directly via email or call (781) 407-0300.