

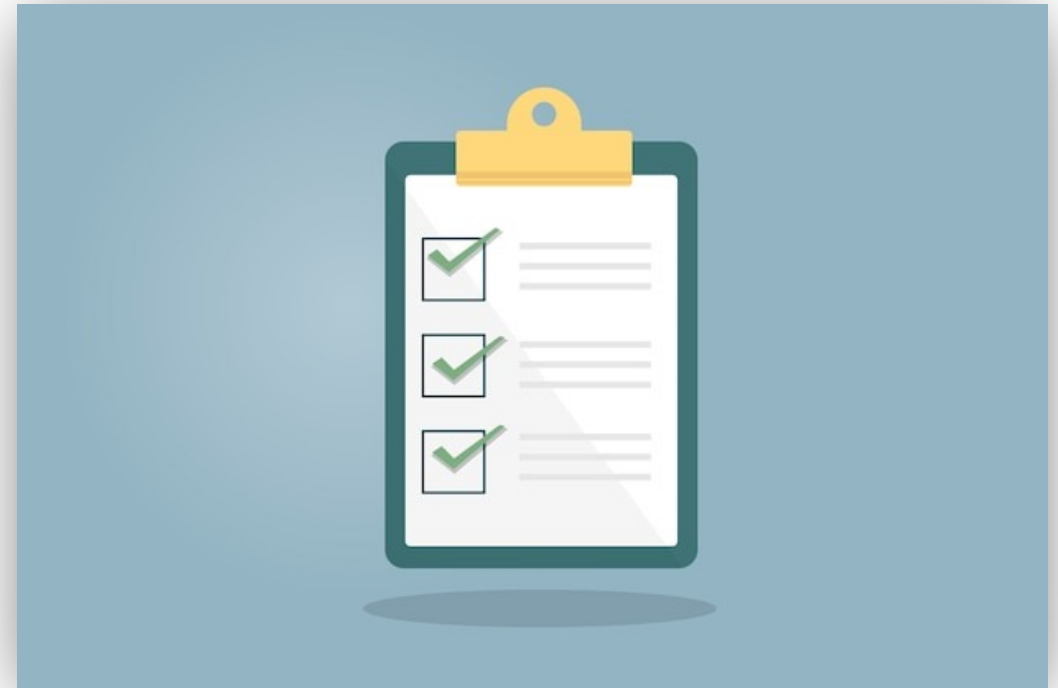
Integrated eSignature Webinar

Learn about updates we've made to this feature for TY23 and how to use it within our software. Plus, DocuSign® will provide a demo of the overall client flow.

TaxAct® Professional

Agenda Overview

- Changes to Expect for TY23
- New Bundle Pricing
- TaxAct Professional Integration Overview
- Demo of Flow for You & Your Clients
- DocuSign Compliance
- How to Buy



DocuSign[®]

TaxAct Professional

Meet Our Presenters



Jeff Ruiz

Senior Product Manager, TaxAct
Jeffrey.ruiz@taxact.com

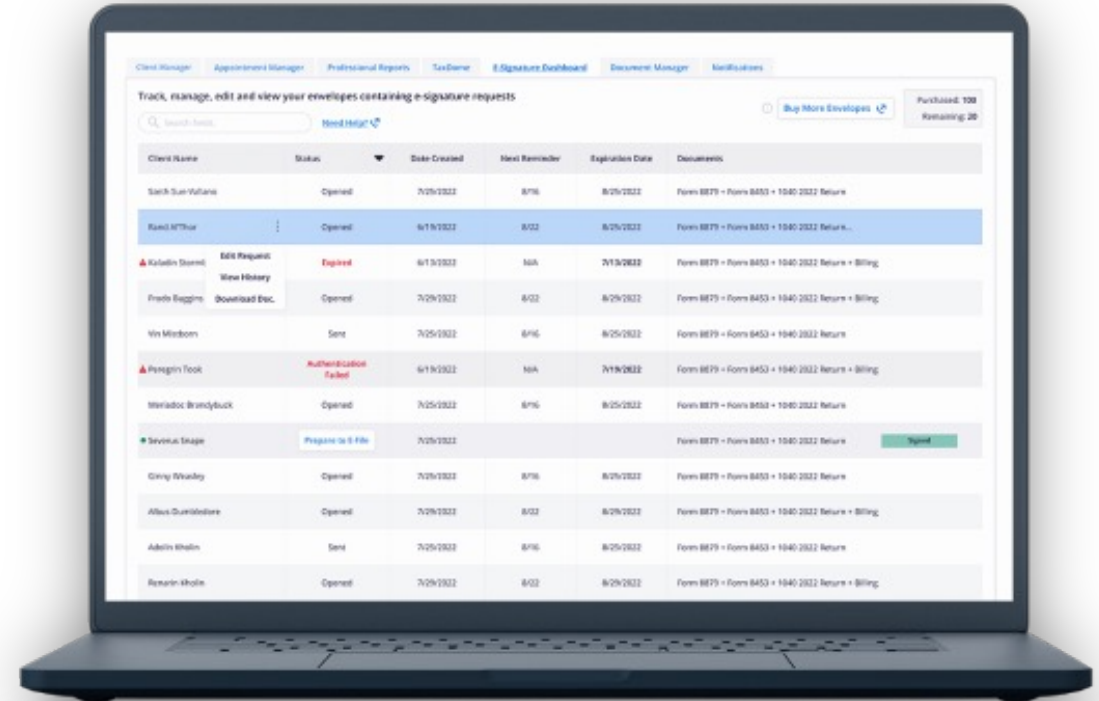


Shelby Maxwell

Financial Services Account Executive
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Changes for TY23

- Custom Uploaded Docs
- eSignature Support for Business Returns
 - 1065, 1120, 1120S
- What's Supported:
 - E-File Authorization Forms (Federal Form 8879 and State Equivalents)
 - Applications for Bank Products
 - Other Documents Related to Tax Prep Services (Excluding Federal Forms 990 and 1041)
- New Volume Pricing



New Volume Pricing

Need more than 250 eSignatures? Contact our sales team: (866) 498-7184.

Pay as You Go	Bundle of 25	Bundle of 100	Bundle of 250
per envelope	\$2.75 per envelope	\$2.50 per envelope	\$2.25 per envelope
\$2.99	\$68.75 \$74.75	\$250.00 \$288.88	\$562.50 \$747.50
Order eSignatures	Order eSignatures	Order eSignatures	Order eSignatures
Included in Pay as You Go	Included in Bundle of 25	Included in Bundle of 100	Included in Bundle of 250
<ul style="list-style-type: none">✓ 2 Recipients✓ 2 KBA identity verification requests✓ E-file Authorization templates - for 1040 Returns✓ Add you own documents for clients to download for their records²✓ State e-filing for states that support eSignatures	<ul style="list-style-type: none">✓ 25 Esignature Envelopes✓ 2 Recipients per envelope✓ 2 KBA identity verification requests per envelope✓ E-file Authorization templates - for 1040 Returns✓ Add your own documents for clients to download for their records²✓ State e-filing for states that support eSignatures	<ul style="list-style-type: none">✓ 100 Esignature Envelopes✓ 2 Recipients per envelope✓ 2 KBA identity verification requests per envelope✓ E-file Authorization templates - for 1040 Returns✓ Add you own documents for clients to download for their records²✓ State e-filing for states that support eSignatures	<ul style="list-style-type: none">✓ 250 Esignature Envelopes✓ 2 Recipients per envelope✓ 2 KBA identity verification requests per envelope✓ E-file Authorization templates - for 1040 Returns✓ Add you own documents for clients to download for their records²✓ State e-filing for states that support eSignatures

eSignature Built into TaxAct Professional

Quickly send, track, and manage eSignature requests within your favorite tax preparation software.

The screenshot displays the 'Customize your request' interface in TaxAct Professional 2023 Test Mode. The window title is 'TaxAct Professional 2023 Test Mode (tst.taxact.com)'. The interface is divided into three main sections: Documents, Sender, and Recipient(s).

Documents: This section contains two document entries: 'Copy of Federal Return • 2 Pages' and 'Federal (Form 8879) • 1 Pages'. The second document has a 'Requesting Signature' button next to it. To the right of these entries is an 'Upload' button with a document icon.

Sender: This section contains two input fields: 'Sender Name' with the value 'Practice Owner' and 'Sender Email' with the value 'austin.tatest@gmail.com'. A link 'Why do I need to enter my email address?' is visible next to the email field.

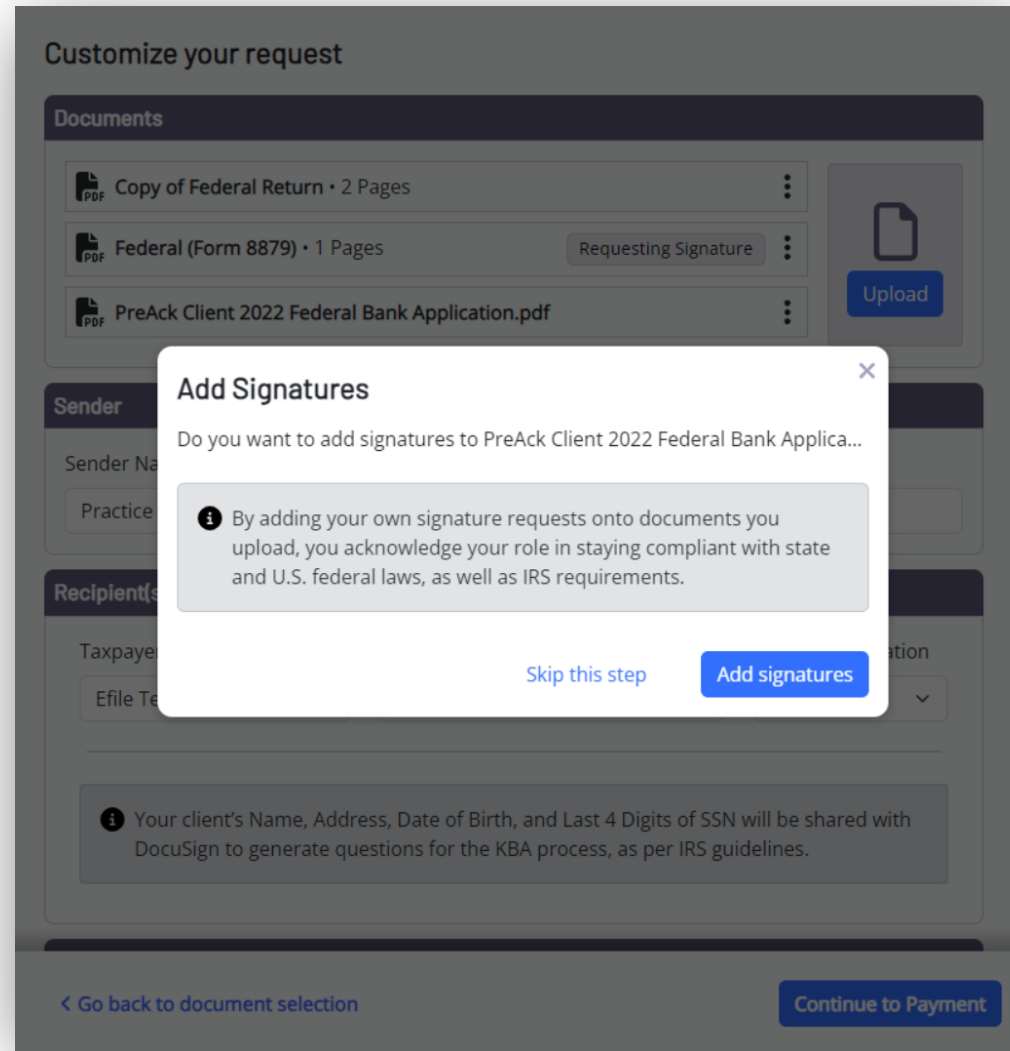
Recipient(s): This section contains three input fields: 'Taxpayer Name' with the value 'Efile Test', 'Taxpayer Email' with the value 'austin.tatest@gmail.com', and 'Identity Verification' with a dropdown menu set to 'KBA'.

At the bottom of the form, there is an information box with an 'i' icon: 'Your client's Name, Address, Date of Birth, and Last 4 Digits of SSN will be shared with DocuSign to generate questions for the KBA process, as per IRS guidelines.'

At the bottom of the window, there are two buttons: '< Go back to document selection' and 'Continue to Payment'.

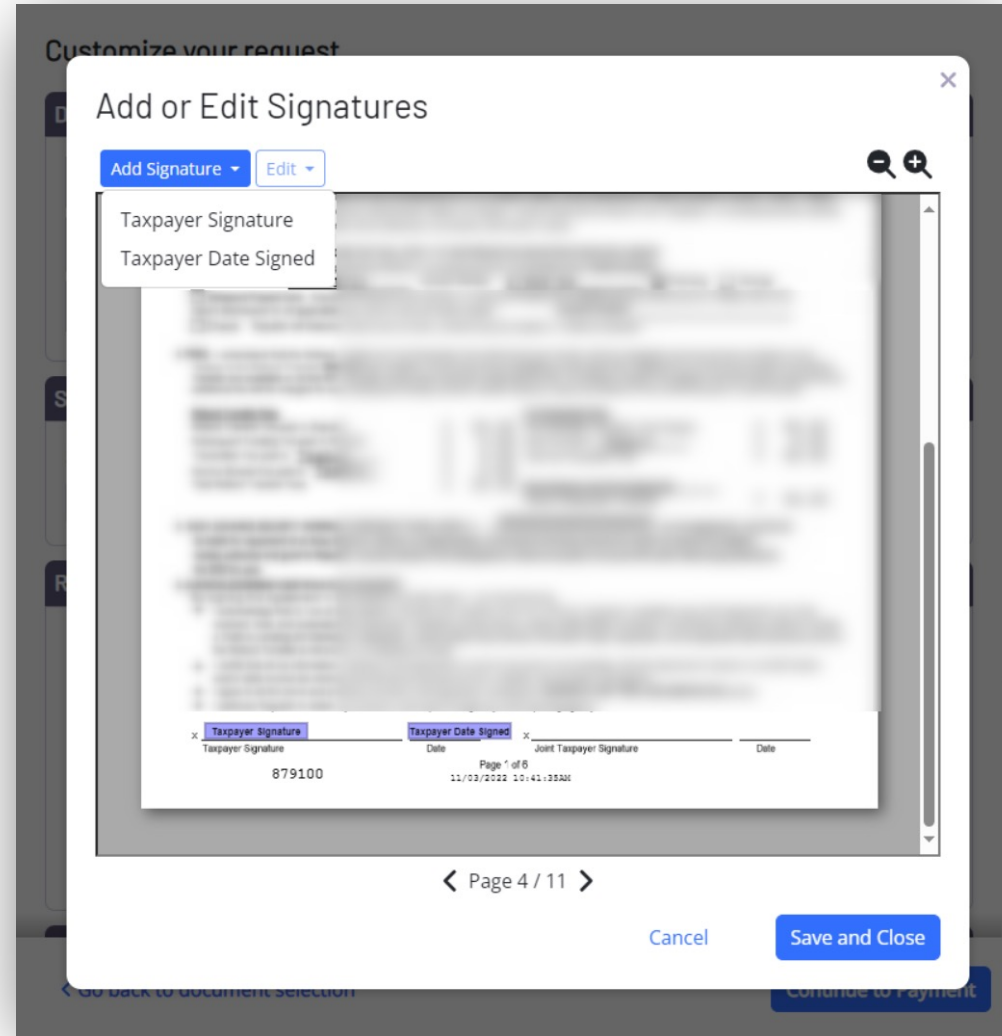
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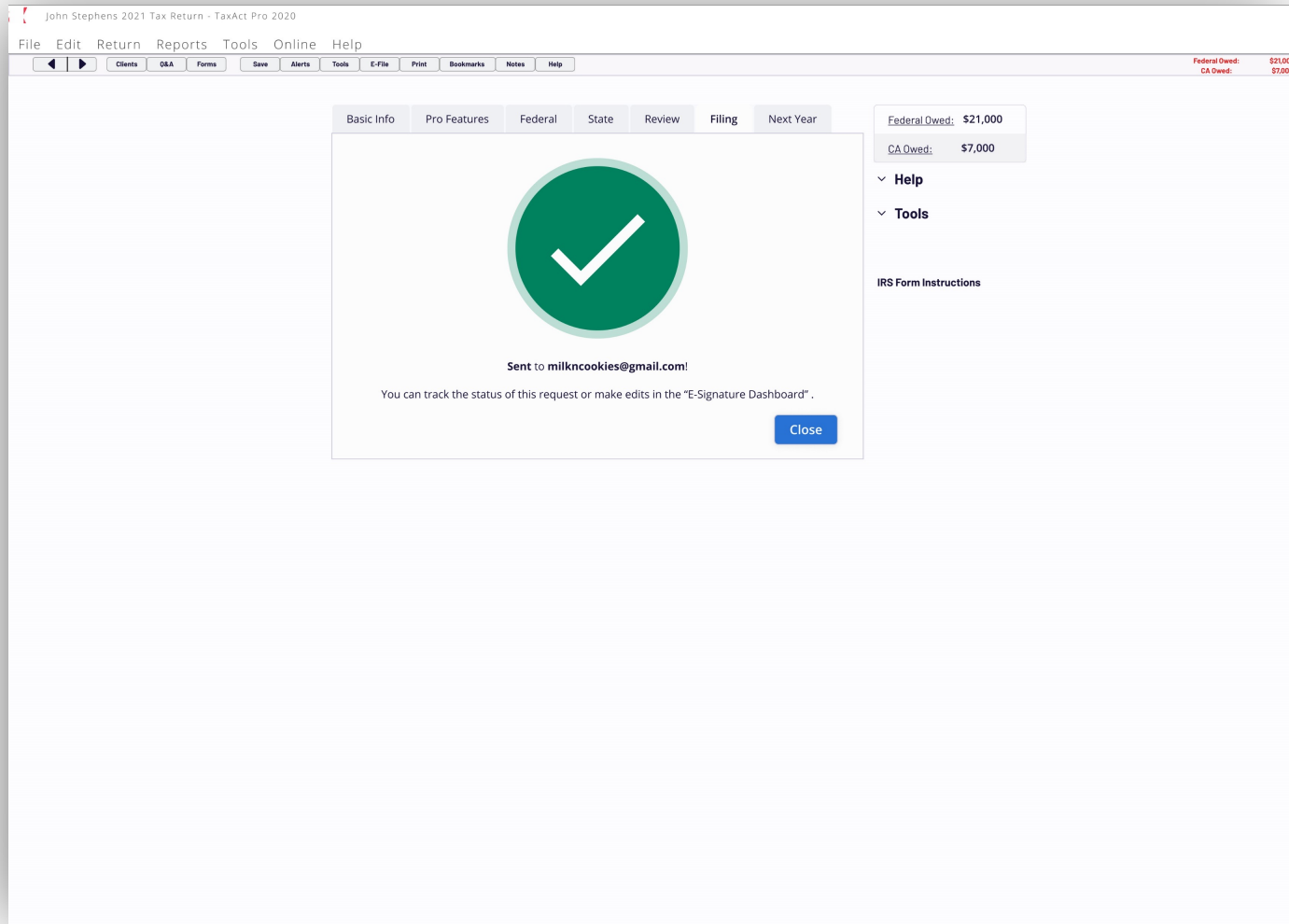
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The screenshot displays the 'E-Signature Dashboard' in TaxAct Professional. At the top, there are navigation tabs: Client Manager, E-Signature Dashboard (active), Appointment Manager, Professional Reports, TaxDome, Document Manager, and Notifications. Below the tabs, a header reads 'Track, manage, edit and view your envelopes containing e-signature requests'. To the right of the header, there is a search bar, a 'Need Help?' link, a 'Buy More Envelopes' button, and a summary box showing 'Purchased: 100' and 'Remaining: 20'.

Client Name	Status	Date Created	Next Reminder	Expiration Date	Documents
Szeth Sun-Vallano	Opened	7/25/2022	8/16	8/25/2022	Form 8879 + Form 8453 + 1040 2022 Return
Rand Al'Thor	Opened	6/19/2022	8/22	8/25/2022	Form 8879 + Form 8453 + 1040 2022 Return...
▲ Kaladin Storm	Expired	6/13/2022	N/A	7/13/2022	Form 8879 + Form 8453 + 1040 2022 Return + Billing
Frodo Baggins	Opened	7/29/2022	8/22	8/29/2022	Form 8879 + Form 8453 + 1040 2022 Return + Billing
Vin Mistborn	Sent	7/25/2022	8/16	8/25/2022	Form 8879 + Form 8453 + 1040 2022 Return
▲ Peregrin Took	Authentication Failed	6/19/2022	N/A	7/19/2022	Form 8879 + Form 8453 + 1040 2022 Return + Billing
Meriadoc Brandybuck	Opened	7/25/2022	8/16	8/25/2022	Form 8879 + Form 8453 + 1040 2022 Return
● Severus Snape	Prepare to E-File	7/25/2022			Form 8879 + Form 8453 + 1040 2022 Return Signed
Ginny Weasley	Opened	7/25/2022	8/16	8/25/2022	Form 8879 + Form 8453 + 1040 2022 Return
Albus Dumbledore	Opened	7/29/2022	8/22	8/29/2022	Form 8879 + Form 8453 + 1040 2022 Return + Billing
Adolin Kholin	Sent	7/25/2022	8/16	8/25/2022	Form 8879 + Form 8453 + 1040 2022 Return
Renarin Kholin	Opened	7/29/2022	8/22	8/29/2022	Form 8879 + Form 8453 + 1040 2022 Return + Billing
Shallan Davar	Sent	7/25/2022	8/16	8/25/2022	Form 8879 + Form 8453 + 1040 2022 Return
Nightblood Sheath	Opened	7/29/2022	8/22	8/29/2022	Form 8879 + Form 8453 + 1040 2022 Return + Billing

Customer Success Story

“I am very satisfied with TaxAct Professional's software. 2022 was my first year using it and it supported my business growing near 75% over prior year. eSignature integration works smooth and like the reporting options. Great cost-effective option for tax professionals.”

- Chris Szulc, Current TaxAct Professional Customer

Demo

DocuSign[®]

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The Leader in Agreement Transformation



Industry Leadership

World's #1 eSignature Solution

Leader in CLM according to Gartner and Forrester

+1M Customers and +1B Signers use DocuSign in +180 Countries



Time To Value

World's largest team of agreement experts

NPS Score of 70 for DocuSign eSignature

+400 pre-built partner integrations and Award Winning APIs



Trust

Secure and scalable infrastructure with 99.99% uptime for eSignature

Industry certifications including SOC II, PCI, and more

Real-time visibility & support for system status

Proactive threat detection and 24/7 activity tracking

The Secure Way to Agree



Purpose-Built Security

Proactive Threat Detection

24/7 Activity Tracking

Full Operations Visibility

Enhanced ID Verification



Reliable and Resilient

99.99% Uptime for eSignature

Built-in Redundancy

Millions of transactions daily

Real-Time Visibility and Support

DocuSign®

Uncompromising
Standards



AICPA / SOC



ISO27001:2013



CSA STAR
Program



ISO27001:2013



PCI DSS



APEC PRP

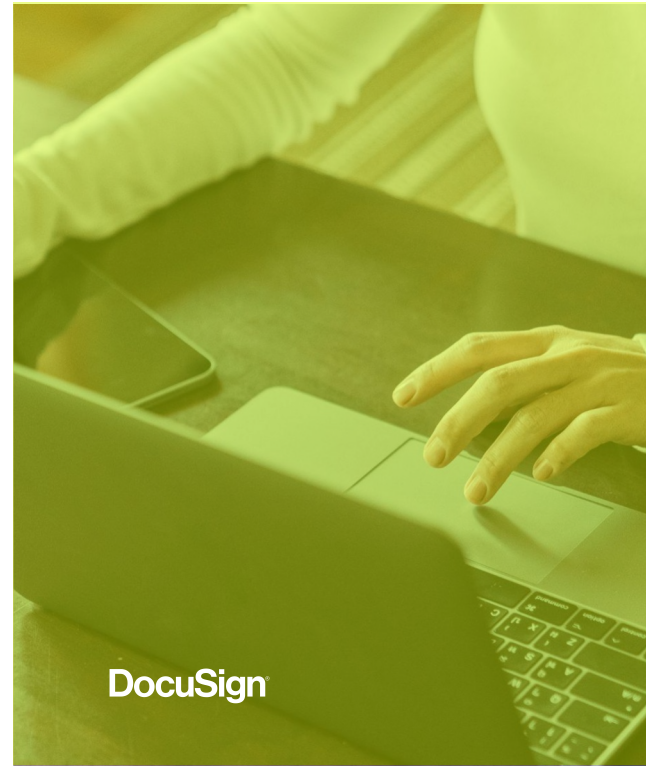
DocuSign | BCR

DocuSign BCR

eSignature Compliance for Tax Forms

- The IRS allows taxpayers and representatives to electronically sign a number of forms.
- DocuSign ensures compliance with the latest IRS regulations for e-signing.
- DocuSign helps prevent identity theft and meets the IRS KYC requirement with the use of Knowledge Based Authentication (KBA).
- Complete audit trail is maintained on all forms so every touch point in the transaction is documented and legally binding.

Source: [IRS.gov](https://www.irs.gov)



The World's Best Brands Use DocuSign



Purchasing eSignatures

- To purchase eSignatures for TY23...
 - Scan the QR code below to reserve eSignatures.
 - Give our sales team a call at 866-498-7184.





Questions?

Disclosures

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²Purchased envelopes and KBAs will activate on or after January 1st and will expire on December 31, 2024. Purchased but unused envelopes and KBAs have no monetary value, before or after their expiration.

³In product eSignatures are available on tax return documents, such as e-file authorization forms (Federal Form 8879 and state equivalents), applications for bank products, and other documents related to tax preparation services, but specifically excluding Federal Forms 990 and 1041.

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