



M&S TaxCaddy™

for your individual tax returns

We're making taxes even easier! With M&S TaxCaddy you can electronically receive your tax organizer, manage and upload your tax documents, communicate with your tax advisor, and sign the e-file authorization form all from the convenience of your computer, smartphone or tablet.

Convenience and security are our top priority. Reach out to Stephanie Jackson at 847-281-3588 or sjackson@mssl.com to sign up today. Once you sign up, follow the simple steps below to start using M&S TaxCaddy.

To use M&S TaxCaddy:



Mowery & Schoenfeld will send you a TaxCaddy invitation via email. From the email, click the Sign Up Free button.



Create your password, setup three security questions and follow the remaining steps to complete your TaxCaddy account.



Log in to your TaxCaddy account and accept Mowery & Schoenfeld's request to connect. This allows us to exchange messages and requests, and access your uploaded documents.



Grant access to your spouse, financial advisors or other users. Link your banks and brokerage accounts to TaxCaddy to automatically retrieve your documents. Install the TaxCaddy app to submit photographs of paper documents as you receive them.



Download your tax returns and sign your e-file authorization forms via the SafeSend Returns integration, directly from your TaxCaddy account.

For questions and to sign up:

Stephanie Jackson
847-281-3588
sjackson@mssl.com

LaHetta Eyrich
224-278-1503
leyrich@mssl.com

To learn more go to
mssl.com/taxcaddy

MOWERY & SCHOENFELD