Engagement Letter

HubSync

HUBSYNC ENGAGEMENT LETTER & ENGAGEMENT LETTER WIZARD

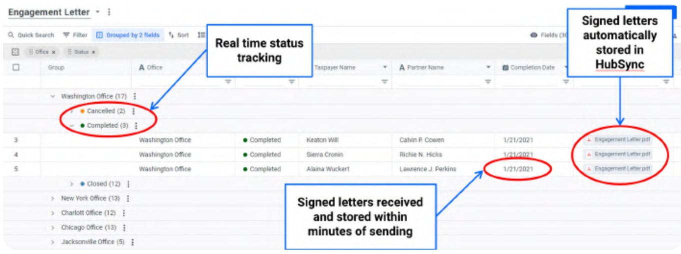
Send 1,000's of customizable Engagement Letters with one click.

HubSync's Engagement Letter module, including our new Engagement Letter Wizard, lets you quickly select and email a standardized or personally customized engagement letter(s) to kick off the tax engagement process, saving you significant time and money. As a preparer, you can send thousands of letters in bulk

- Easily and quickly track the status of e-signatures
- Automatically store all signed letters
- Powerful search capabilities to quickly find the letters you need
- Integrate with your CRM systems using HubSync's Shared Data Service module or other ERP systems to automatically populate contact information. Easily make edits to incorrect emails and resend the letters without additional cost

Our **ENGAGEMENT LETTER WIZARD** module provides even more valuable functionality:

- Customize the content to the specific engagement needs while controlling changes to risk or compliance specific content
- Use building blocks to easily maintain 100's of templates to keep up to date for regulatory changes
- eSign integration available with your CRM or through HubSync's Shared Data Services
- View blockages in getting your engagement letter signed



BY FORMALIZING your engagement letters and strategy, you will see:

- Quicker turnaround of Engagement Letters: One client saw 20% of their Engagement Letters are signed within 3 days and 90% within 2 months
- Our modern client experience allows for deeper connections & trust with your clients
- Opportunity to formalize your relationship and statements of work
- And great opportunities to save money and time and add significant value
- A reduction in risk due to the controlled customized content

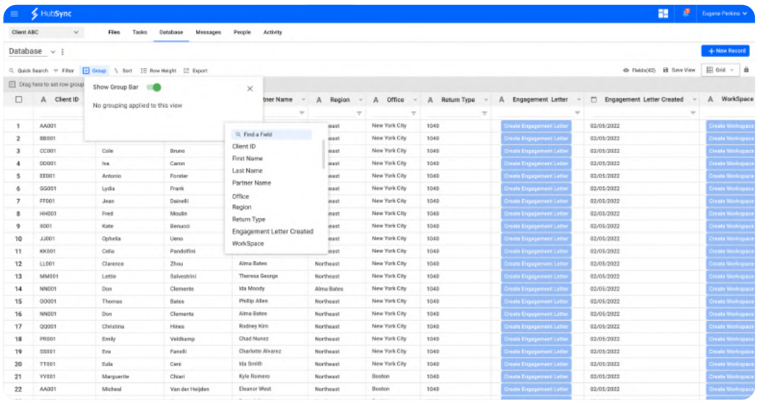
Simplify and automate the tax preparation and consulting process from start to finish.

AS A FIRM PROFESSIONAL

Quickly select hundreds of engagement letters that will be emailed directly to your clients. This digitized process will:

- Provide transparency
- Minimize any misunderstandings and clearly state services upfront to avoid scope creep
- Promote client confidence
- All signed EL are found in the HubSync dashboard that can be easily searched, filtered or grouped any way you choose

Engagement Letter



In addition, HS uses AssureSign to digitally and safely the documents through our eSignature process. Further, with HS, you can download and store all completed PDF documentation in the firm's own document management system.

Even setup is easy. Using our Shared Data Service module, client information gets automatically populated into HubSync.

AS THE TAXPAYER

All you need to do is e-Sign from the secure link. The taxpayer (and spouse if applicable) receives an email with a clickable link to be able to read, review and sign the document.

It's that easy! And your clients are going to love the simple, modern way to get these letters signed without the hassle of downloads, printing and scanning back to email!

Please Sign Your Tax 1040 Engagement Letter

CN **AssureSign** <notifications@assuresign.com>
To: Customer

Mon 10/24/2022 22:23

You don't often get email from notifications@assuresign.com. Learn why this is important

Dear Customer,

CPA Firm would like to thank you for choosing our firm for your tax compliance needs. We're looking forward to serving you over the next few weeks and months. This year we have enhanced the process for obtaining electronic signatures on our engagement letters. This streamlined process allows us to deliver the engagement letter to you, and you can now easily review your letter, validate the information is correct and sign the document. Please click on the Begin Signing link below to start the process.

To better serve our clients, CPA Firm is also launching a new client platform with a document collection portal. The new platform provides a user-friendly, digital space for you to collaborate with your tax engagement team and to deliver your tax documents to us electronically. Please note that you will receive a welcome email to CPA Firm's new client platform in early February 2022.

Begin Signing

Thank you,

Document signing powered by **Nintex AssureSign**.
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Reply Forward

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Dashboards & Analytics

HUBSYNC DASHBOARDS

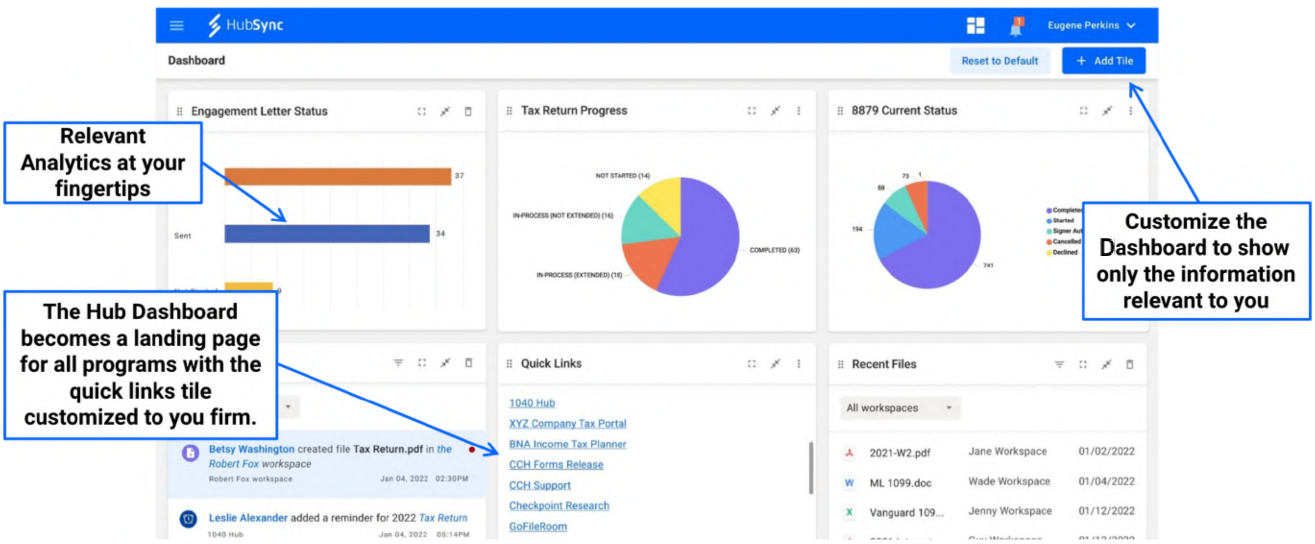
HubSync provides a dashboard of customized analytics for your firm. Your custom dashboards are made up of widgets and are integrated with HubSync data and other products used by CPA firms.

HubSync Dashboards empower users to decide, and act based on real-time data.

- Intuitive widgets
- Granular permissions
- Countless visualizations of business intelligence data
- Connections to multiple platforms
- Ability to view and export underlying data
- Multi-level drilldowns
- Easy-to-use
- Custom dashboards to suit reporting needs
- Geographic views by Office, Partner, Client
- Combinations of Charts & Graphs

If you can dream it, we can build it. **SO MANY WIDGETS AVAILABLE!**

- Bar Charts
- Column Charts
- Stacked Bar Charts
- Stacked Column Charts
- Area Charts
- Stacked Area Charts
- Radar Polar Charts
- Maps
- Grids
- Pivot Grids
- Tree Maps
- Heat Maps
- KPI Cards
- Number Cards
- Radial Gauges
- Pie Charts
- Doughnut Charts
- Pyramid Charts
- Funnel Charts
- Line Charts
- Spline Area Charts
- Combination Charts
- List Boxes
- Combo Boxes
- Range Navigators
- Range Sliders
- Date Pickers
- Period over Period



Dashboards & Analytics

HubSync connects **3RD PARTY DATA SOURCES**

A wide variety of 3rd party data sources are also supported ranging from files and databases to REST API sources. We work with our clients closely to determine integration needs.

Here are a few examples of data sources we have connections to. Want to see a platform not listed, simply ask!

- CCH Axcess Tax
- CCH Prosystems fx Scan
- CCH Axcess Workflow
- CCH Axcess Electronic Filing Status
- CCH eSign
- Thomson Reuters OneSource
- IRIS Practice Engine
- Thomson Reuters Checkpoint
- Thomson Reuters Go System Tax RS
- Thomson Reuters Go File Room
- Thomson Reuters FirmFlow
- Salesforce
- IRIS Star

Most commonly used **DASHBOARDS** include:

Tax Return Tracking

Monitor the status of your tax returns across offices, by partner, and by status.

eSign (8879) Tracking

Monitor the status of your electronically delivered 8879s by offices, by partner, and by status.

Electronic Filing Status Tracking

Track status of your uploaded and released returns to taxing authorities by return type, office, status, and taxing authority.

Engagement Letter Tracking

Tracking the status of your electronically delivered engagement letters by office, partner, and by status.

Usage and Activity Tracking

Monitor and review activity in HubSync modules (e.g., Files Uploaded and Modified) for both your internal and external users.

Organizer Activity and Status Tracking

Monitor and review activity within Tax Organizers delivered to your clients (e.g., progress, % completed, # of files uploaded compared to total requested).

Indirect Tax Analysis

View liability across state, state filing threshold indicators, notices by state, % change from the prior period, track liability over time by state, county, or locality.

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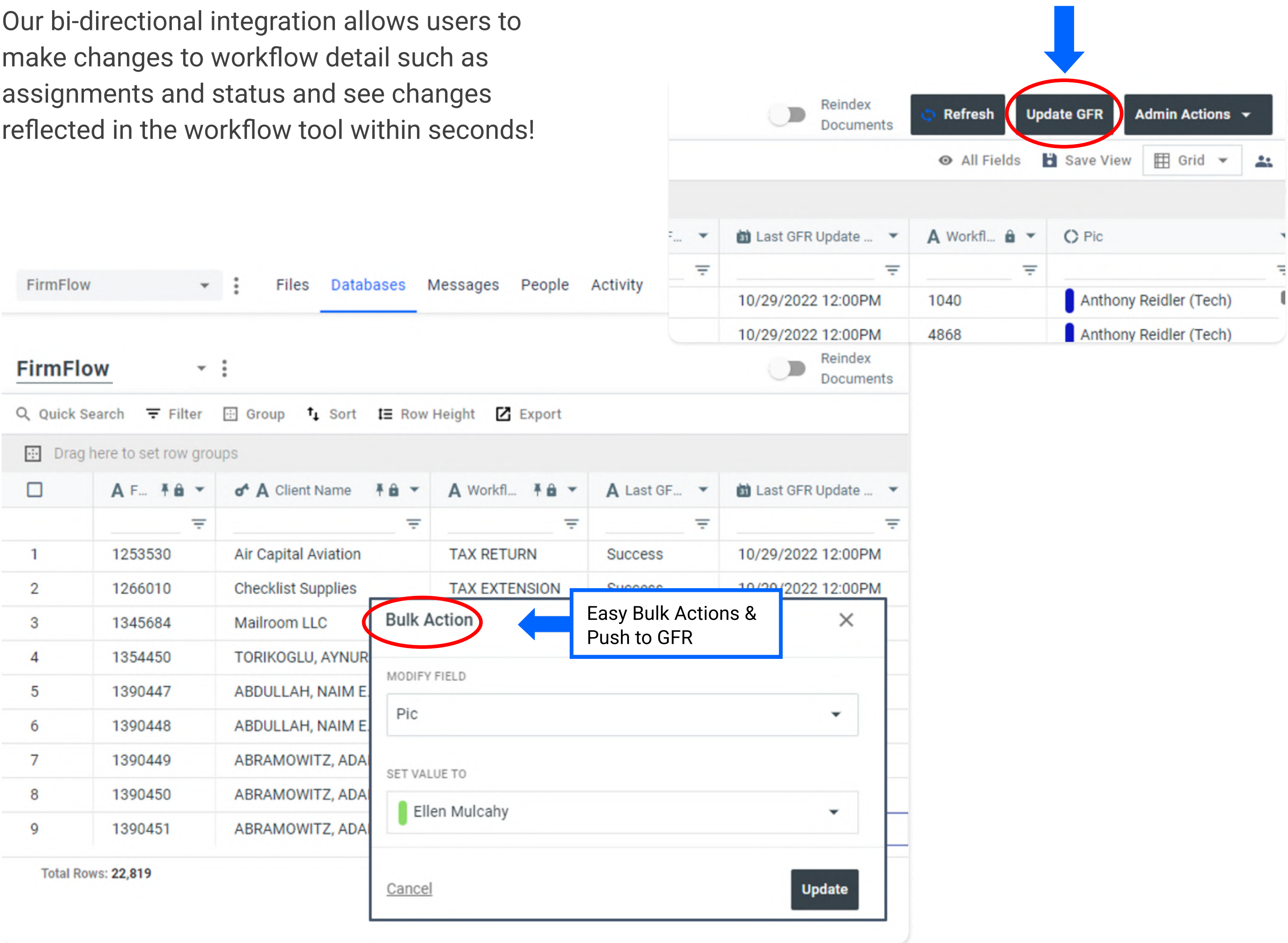
Tax Return Tracker

HUBSYNC TAX RETURN TRACKING
integrates your firms' workflow data and provides real time updates

Use HubSync's Tax Return Tracking module to integrate your firm's workflow data to see real-time status of your engagements (e.g., 1040, 1120…etc.).

Our bi-directional integration allows users to make changes to workflow detail such as assignments and status and see changes reflected in the workflow tool within seconds!

We have integrated with GoFileRoom and FirmFlow and improved upon these platforms to make it easier to track and see where the work is, especially with two API calls every hour!



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Tax Return Tracker

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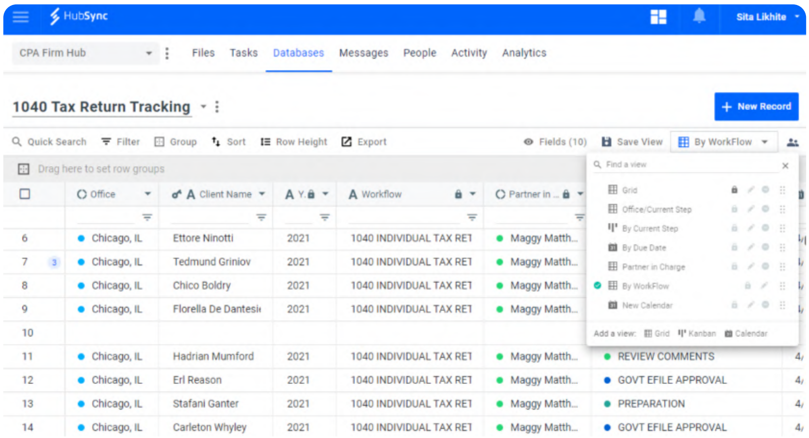
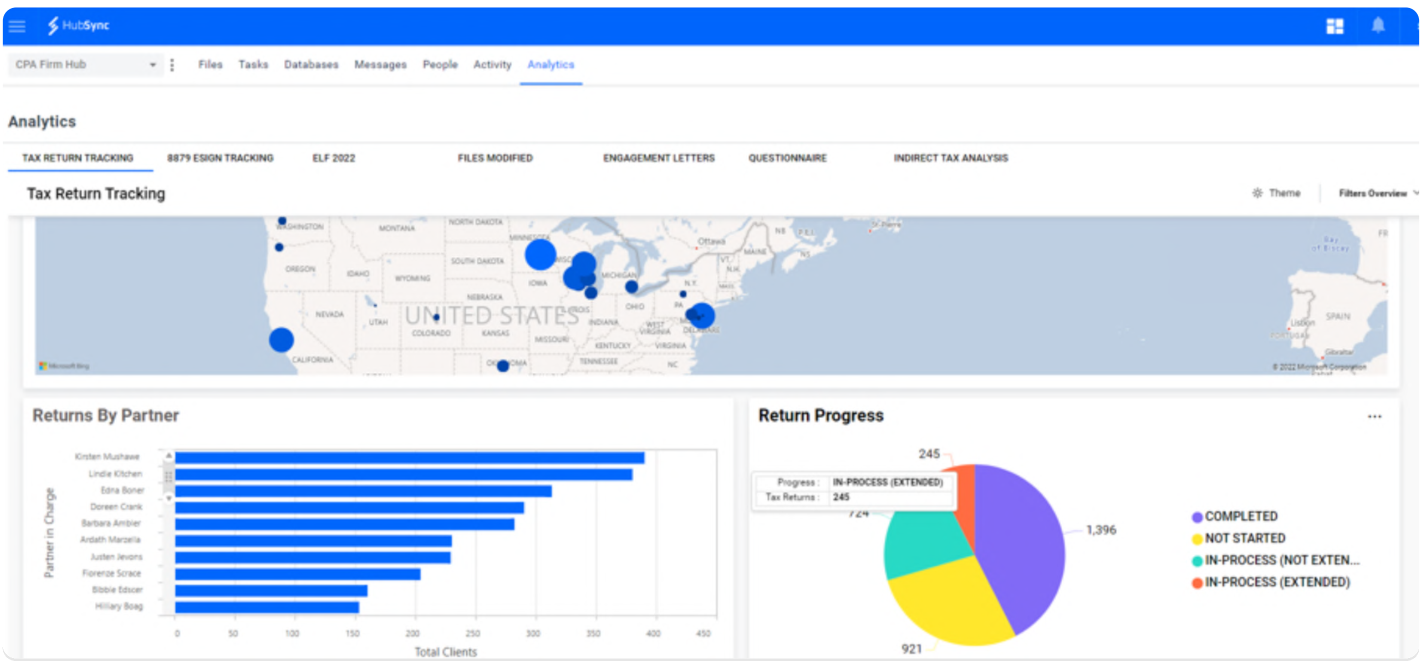
- Slice and dice the information using our proprietery “Spreadsheet as a Database” feature to get meaningful insights into the progress of tax returns
- View KPIs and get detailed drill down reporting on demand



PROPRIETARY FEATURES include:

- Ability to make bulk updates and push them to GFR. This allows you to reduce the overnight wait for making bulk changes to PIC, Informational fields and other similar fields to a just a few minutes!
- Any firm updates in HubSync are automatically synchronized back to FirmFlow
- Update workflows one-at-a-time OR in bulk
- Bulk updates that save significant time for YE rollovers
- Substantial time savings over the current manual and timely process.
- Update thousands of records – the scale is incomparable



Workpapers

HUBSYNC WORKPAPERS

HubSync's Tax Return Workpaper provides a common platform that brings together components essential to prepare and file a complete tax return.

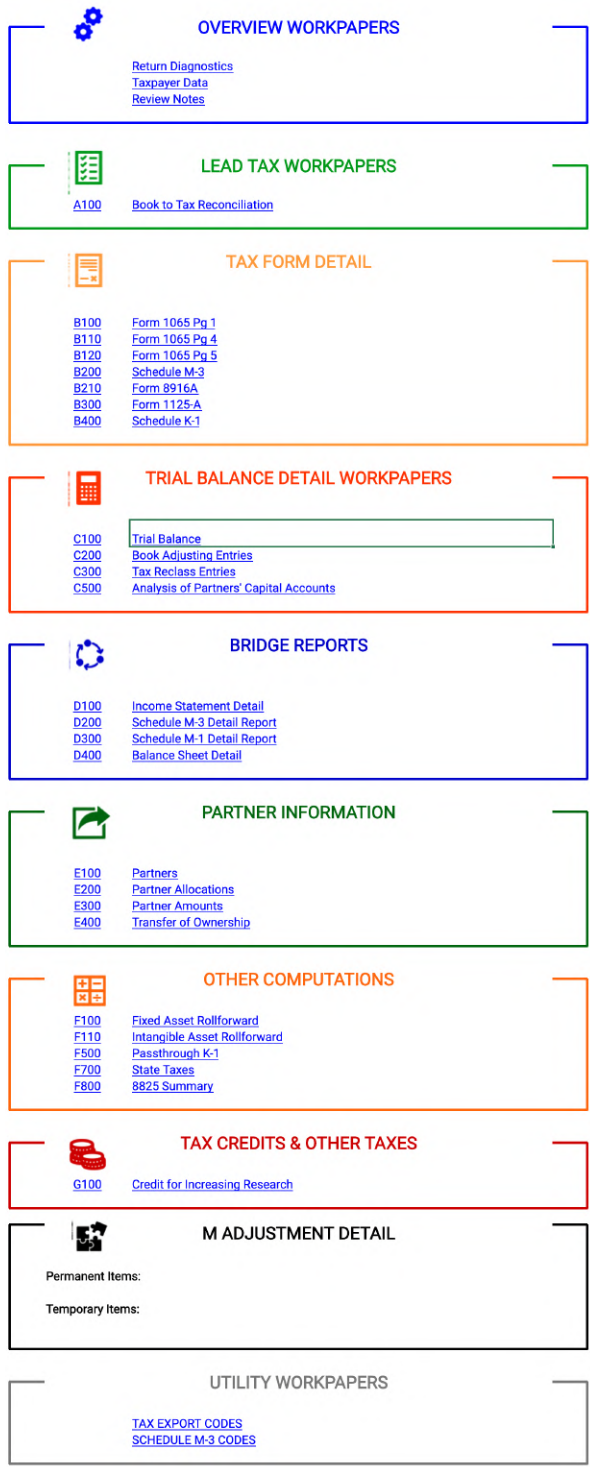
Our automated engine performs key tax calculations for complete and accurate tax return filing. High level benefits include:

- Elimination of manual data entry
- A 360-degree view of the return without opening the tax preparation software
- Flexible designs allow for the preparation of returns with varying complexity
- One-touch, seamless integration with CCH Axcess & Thomson Reuters GoRS/OIT
- Multi-level sign-off capabilities by level, sheet and line
- Embedded Review Note functionality with the ability to purge notes
- Standardized training across your firm
- Significant ROI and time savings

HubSync Workpapers have **QUICKLY BECOME BEST IN CLASS**

HubSync's flexible workpaper design is available for all return complexities. Super charged teams use one common platform to standardize their compliance process as well as training for co-located teams.

Further, all workpapers support multiuser sign-off functionality, by line-level, by sheet, as well as overall workpaper sign-off and tick mark options to reduce redundancies and create tracking organization.



Why ever go back to single-use, excel workpapers with zero integration into CCH Axcess or GoRS?

HubSync. Your end-to-end tax delivery solution.

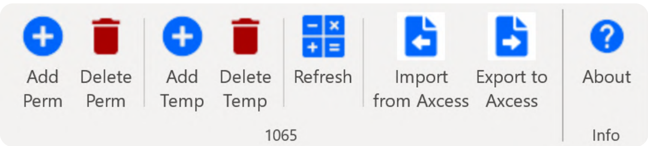
Workpapers

HubSync

UNIQUE FEATURES

HubSync's standardization across workpapers sets us apart from all other tax preparation platforms. We offer engagement teams an end-to-end tax return processing solution for numerous return types.

• *Custom Ribbons*



• *Dynamic Ribbon*

HubSync's embedded ribbon connects dynamically with each workpaper platform to run complex calculations, relative to each type of tax, throughout its workbook.

- Temporary and permanent tax adjustments
- Application of journal and reclass entries
- Full book-to-tax computations
- Supporting bridge tax reports
- Partner Allocations
- OCR integration for tax source documents (1040)
- Optional review note feature
- Single click integration with tax filing software

• *Review*

Integrated ribbon add-in is available as needed for Review Note functionality. Review Notes serve as a direct cell-level commentary option between Workpaper users. Review Notes can be resolved on an individual basis and disposed of from the Workpaper at any time, during the preparation process.

• *Push & Pull*

Each workpaper offers unique import & export features that create process efficiencies, reduce costs, and produce a streamlined internal process for seamless dataflow and consistency. Flexibility is provided after data is pulled (even scanned data!) for review and manipulation.

Some examples of data capabilities include but, are not limited to:

- Prior year information
- System scanned source documentation
- Trial balance
- Partner demographics

• *Live Return Preview*

HubSync's preview feature provides a live "simulation" of the end filing product. Our Workpapers consolidate the details and apply calculations to generate a high-level preview of the return.

• *Integration with Tax Filing Software*

All Workpapers are equipped with built-in single-click integrations to tax filing software solutions. Validations are enforced to support accurate transmission of data and ease of error diagnosis.

Import to workpapers:

- Sync with existing or prior year return detail
- Seamless transition for first time users

Export from workpapers:

- Satisfy annual filings
- Correct and update misaligned external data