LEVERAGE IRS DATA TO MODERNIZE YOUR CLIENT EXPERIENCE

TaxStatus Pro for Wealth Managers
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www.taxstatus.com

Client and Advisor priorities are shifting in the generation of holistic wealth management

Hybrid Interactions
Dynamically combine in-person, virtual, and always-on digital client experiences

Client-Centric, Advisor-Led
Digitization enables delivery of compelling engagement across the entire client lifecycle

Hyper-Personalization
Micro-segmentation enables touchpoints to be unique to client needs, preferences, and timing.

Make Big Data Small
Present insightful & actionable data paired with guidance & education

Wealth Beyond Investments
ROI is no longer just portfolio ROI – drivers are purpose, collaboration, and client experience

Streamline Delivery
Improve quality & productivity with transparent automation to deliver at scale

Meanwhile, existing challenges limit an Advisor's ability to deliver

- Clients require multiple touchpoints to provide records
- Advisors receive only what is top of mind or readily available
- Client data comes in the form of paper or unsearchable documents
- Advisors and staff spend countless hours turning documents into usable data
- Client misinterpretation causes inaccurate and incomplete records
- Advisors are held to a fiduciary standard on advice informed by incomplete facts

What if those challenges were solvable with digital IRS records and insights?

- In just one Client touchpoint, Advisors gain a baseline understanding informed by the single most comprehensive and official source of Client records.
- Fully digital Client records, straight from the source, enable Advisors to spend their time establishing an accurate and complete understanding their Clients.
- Advisors are advising from a comprehensive Client baseline, today and into the future with real-time updates flowing into Client CRM profiles, financial plans, and books & records.

What insights can you uncover in your Client's IRS records?

Employer

Employment History

Marriage status

Marriage history

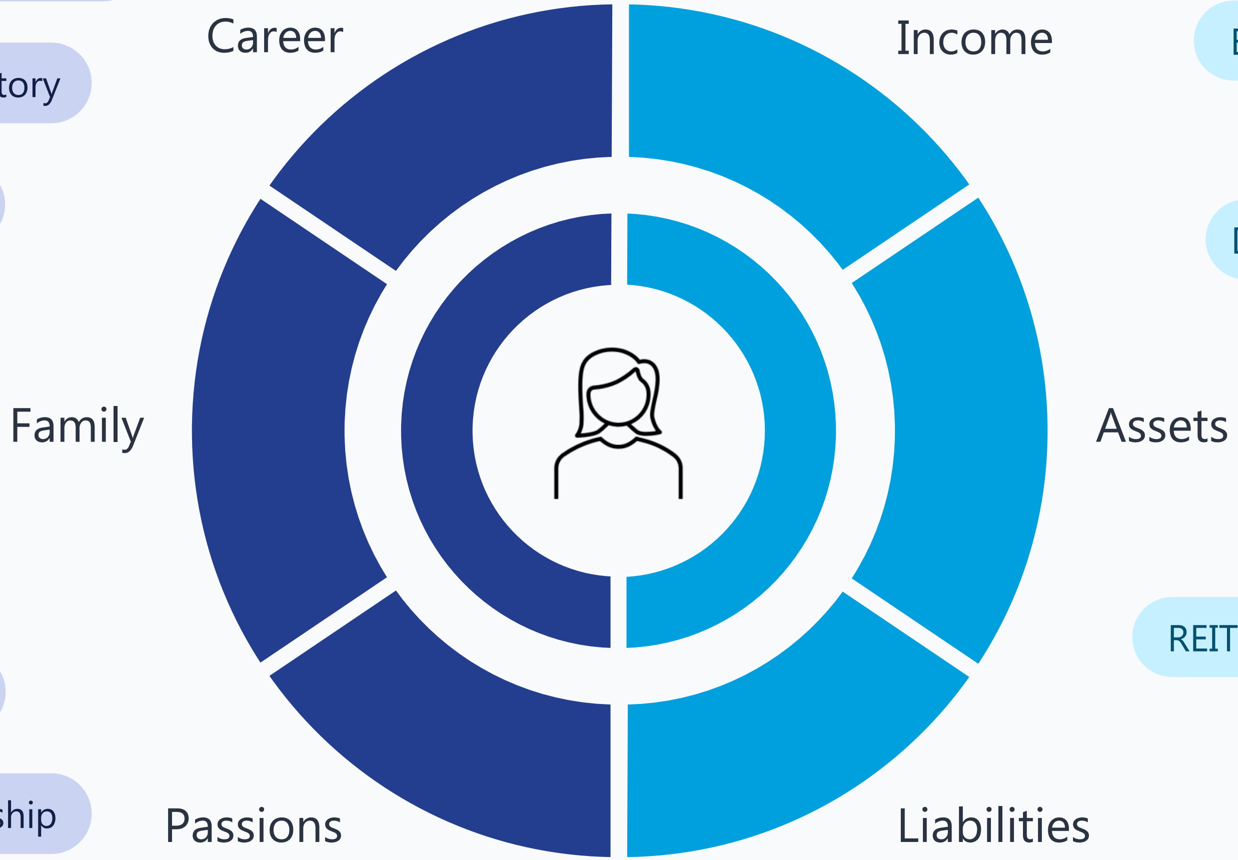
Child Dependents

Elder Dependents

Philanthropy

Business Ownership

Business Payroll



Effective Tax Rate

Employment Income

Business Income

Rental Income

Dividend & Trading Income

Bank Accounts

Investment Accounts

401k & IRA Accounts

REIT & Real Estate Investments

Health Savings

Tuition Loans

Home Mortgage

Hyper-personalize, streamline, and reduce risk across your entire client lifecycle

Client

ONBOARDING
Seamless and digital client consent saves you and your client days of time hunting down tax returns

PLANNING
Holistic advising from the start - a great first impression - the foundation to a long-term relationship

SERVICE DELIVERY
TaxStatus Insight reports enable Advisor to provide tailored updates & guidance with little to no pre-work

EXPANSION
Hyper-personalized recommendations create cross-sell opportunities in person and digitally

Advisor

ONBOARDING
Include KYC / KYB verification at the start of your client relationship

PLANNING
Have a comprehensive picture of your client's situation - all tax and income records

SERVICE DELIVERY
Automatically receive updated tax records & insights as they are available

MAINTENANCE
Client CRM records are always up to date. Proactive self-healing books & records reduces compliance risk

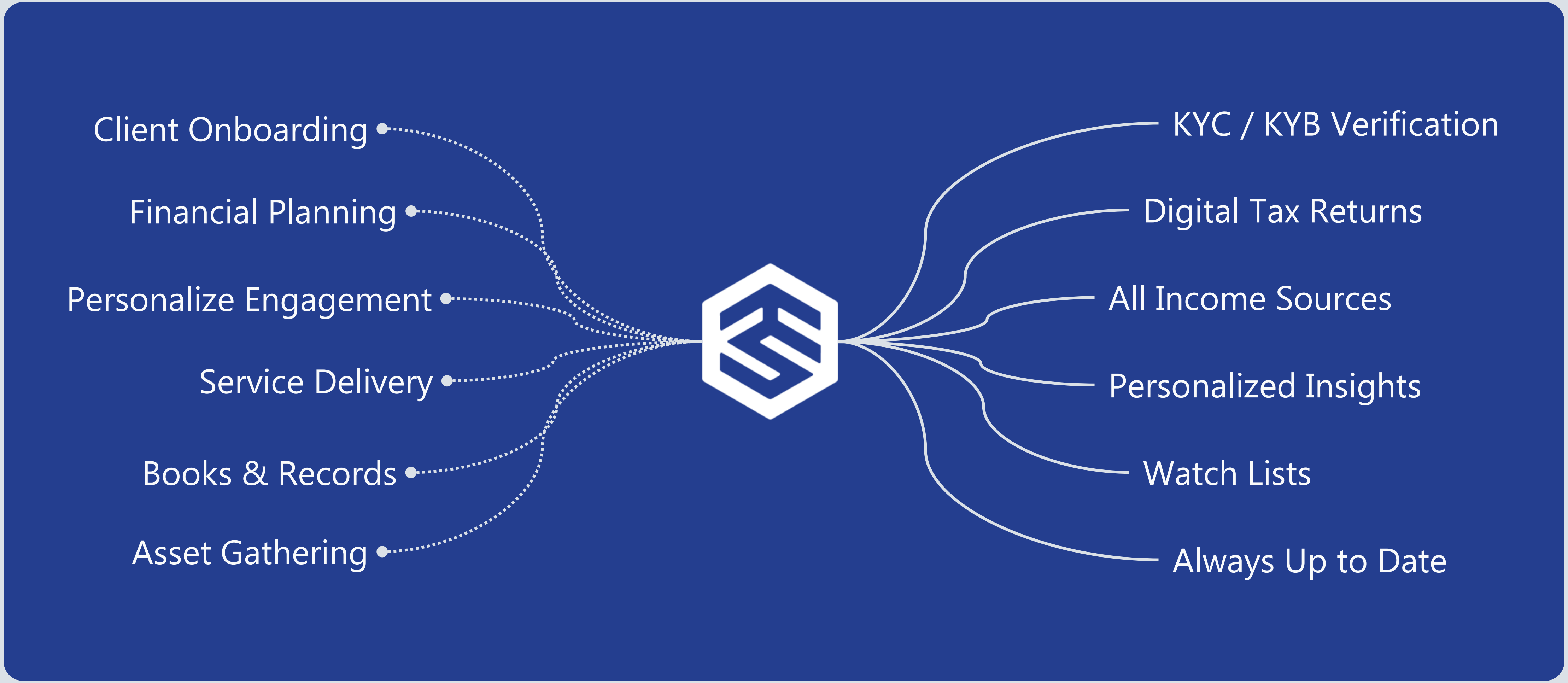
IRS Health Check

Digital Tax Records

Taxpayer Insights

Watch Lists & Triggers

Always Up to Date


Client Onboarding
Financial Planning
Personalize Engagement
Service Delivery
Books & Records
Asset Gathering
KYC / KYB Verification
Digital Tax Returns
All Income Sources
Personalized Insights
Watch Lists
Always Up to Date

There is not a more official and comprehensive source of client income, businesses, and financial accounts than your client's IRS records