

# TaxCaddy


## Create Your Personal Account

You'll receive an email from us, similar to the one here. **Click Sign Up Free** in the email to begin your enrollment.

On the First Time Enrollment screen, enter the following information and then **click Next**.

- **First Name**
- **Last Name**
- **Email Address**
- **Confirm Email Address**
- **Mobile Number**
- **Create Password**
- **Confirm Password**

That's all there is to it! If you have questions please call our office in Williston and Rutland.



**Davis & Hodgdon Associates CPAs, PLC**  
invited you to create a **TaxCaddy**  
account

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Hello Marissa,

Davis & Hodgdon Associates CPAs, PLC welcomes you to create your free TaxCaddy account! TaxCaddy simplifies tax time by allowing you to:

- Easily gather documents year-round by:
  - Uploading them from your computer
  - Taking a photo of them with your mobile phone
  - Automatically retrieving them through Smart Links from financial institutions and payroll service providers (W-2, 1099 and 1098's)
- Deliver all documents to Davis & Hodgdon Associates CPAs, PLC electronically
- Complete questionnaires online (no more bulky package of questions!)
- Review your tax return upon completion
- Review and electronically sign documents

Please use this link for a step-by-step guide to walk you through the process of setting up your account: <https://bit.ly/3swwe8r>

We hope to simplify the tax return process for you using this new technology. If you would like to opt out of TaxCaddy, please let us know via email at [Operations@dh-cpa.com](mailto:Operations@dh-cpa.com) or give us a call at 802-878-1963. If you sign up for TaxCaddy, but would still like a paper questionnaire mailed to you, please let us know as well.

Best wishes for a prosperous new year!

[Sign Up Free](#)

*TaxCaddy works best on Google Chrome browser, but is also supported on Firefox, Edge, and Safari. **TaxCaddy is not supported on Internet Explorer.***

*If you and your spouse share an email address – That's okay! You can share one log-in that will allow you both to sign documents.*

*If you are unable to set up multi-factor authentication via cell phone, please reach out to our Operations Team for assistance setting up your log-in.*