NEW IN HUBSYNC:
TRACK YOUR TAX RETURN PROGRESS IN REAL TIME

We've updated HubSync to make it easier for you to track your tax return progress. We know technology updates can sometimes feel like relearning the same system all over again. Rest assured that this change is designed to give you more control and visibility, not more complexity.

WHAT'S NEW

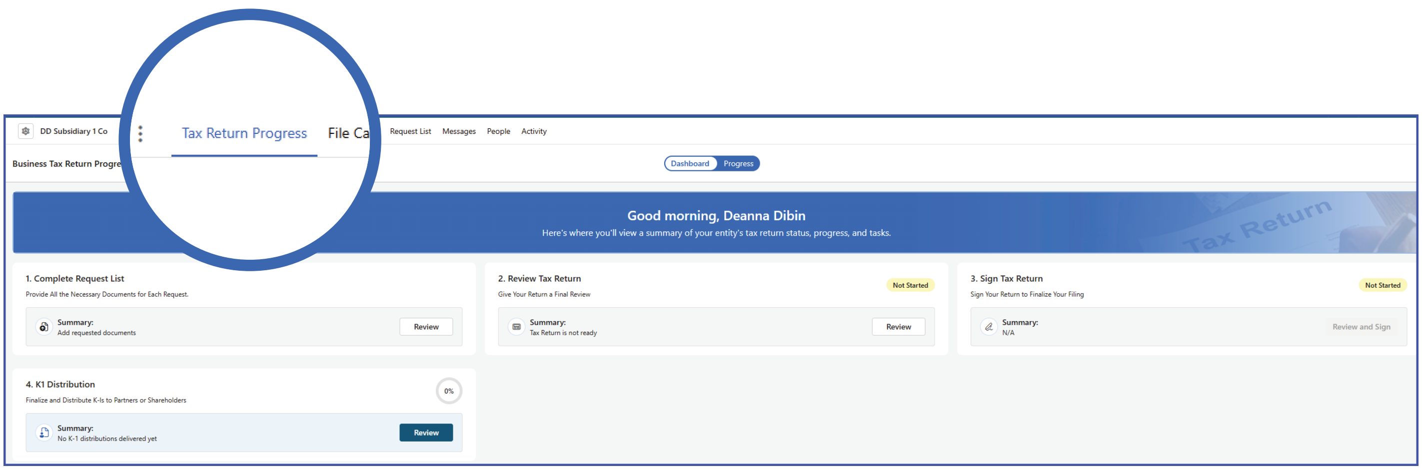
When you log into HubSync, you'll see a **Tax Return Progress Dashboard** that shows you exactly where your return stands and what we need from you. No more guessing or waiting for updates.

YOUR SIMPLE PROCESS

1. **Complete Your Request List.** Upload any documents or information your advisor has requested. You can add items at any time throughout the process.
2. **Review Your Tax Return.** Once we've prepared your return, you'll receive a notification. Review your return directly in HubSync and reach out to your advisor with any questions.
3. **Sign Your Tax Return.** After reviewing, you can electronically sign your return right in the system. If you need to sign an engagement letter first, you'll see that step as well.
4. **Handle Any Additional Items.** Depending on your situation, you may need to mail tax payments or returns. We'll guide you through any specific details related to your return.

QUESTIONS?

Your advisor is here to help! If you get stuck or something looks different than expected, please reach out to your CRI team.



Note: *You may see additional steps depending on your business structure.*

†This is not a CPA firm.

*Assurance, attest, and audit services provided by Carr, Riggs & Ingram, L.L.C.