

LAST-MILE TAX DELIVERY

Send, Sign, Remind, Get Paid — *Without The Back-And-Forth*

Sending returns shouldn't feel like a project. Yet you're assembling 8879s, K-1s, payment links manually — too many tools, not enough clarity.

Deliver automates the last mile of tax prep.

From e-signatures to payments, to client education. One link. One flow.

WHAT SLOWS YOU DOWN

- ◆ **Manual assembly**
Staff waste time building return packets by hand
- ◆ **Signature chaos**
Building signature boxes and payment links takes forever
- ◆ **Clients don't pay**
Confusing process = delayed payments

WHAT DELIVER DOES

- ◆ **Complete packages**
Admins send full return packets — no CPA needed
- ◆ **Auto-tagged signatures**
IDs, dates, Stripe links — built in and verified
- ◆ **Smart client link**
One link: sign → pay → done. Friction-free.

"Deliver exceeded expectations. It streamlined our process, saved time with auto-identifying key pages, and centralized everything in one place. We honestly can't imagine not having it now."

Aiola CPA, PLLC

REAL RESULTS

Built for tax teams. Let your admins deliver returns like pros. No CPAs. No PDFs. No chasing.



Less time packaging

30 min → 3 min per return packet



Paid faster

Clients pay before signing — no chasing



Scale without staff

Deliver at volume — no new hires needed

DELIVER THAT JUST WORKS



Demo_CPA James Watson Admin

Deliver

Search by Entity or External Entity ID | Select year | Select status | Send

<input type="checkbox"/>	Entity Name ↓	Return Name	Year	Status	Signatures	Payments	Last Activity	Reminder	Assigned Firm User	...
<input type="checkbox"/>	Legend-ary	Legend-ary-TRD2.pdf	2024	Signed	4 / 7	2 / 5	20 hours ago	<input type="checkbox"/>	Sara Jones	...
<input type="checkbox"/>	Jackson, Max	TaxReturn_2024.pdf	2024	Sent	5 / 5	4 / 4	a day ago	<input checked="" type="checkbox"/>	Alfred Williams	...
<input type="checkbox"/>	Canada Goose	TRD_2024.pdf	2023	Signed	6 / 6	3 / 3	6 days ago	<input type="checkbox"/>	Katie Sims	...
<input type="checkbox"/>	Mosby, Ted	TRD_final_2024.pdf	2022	Finished	8 / 8	3 / 8	12 days ago	<input checked="" type="checkbox"/>	Oliver Marshall	...
<input type="checkbox"/>	Carter, Emily	Client_Audit2023.pdf	2022	Sent	7 / 11	3 / 3	16 days ago	<input type="checkbox"/>	Alfred Williams	...

Ready To Skip The Signature Circus?

