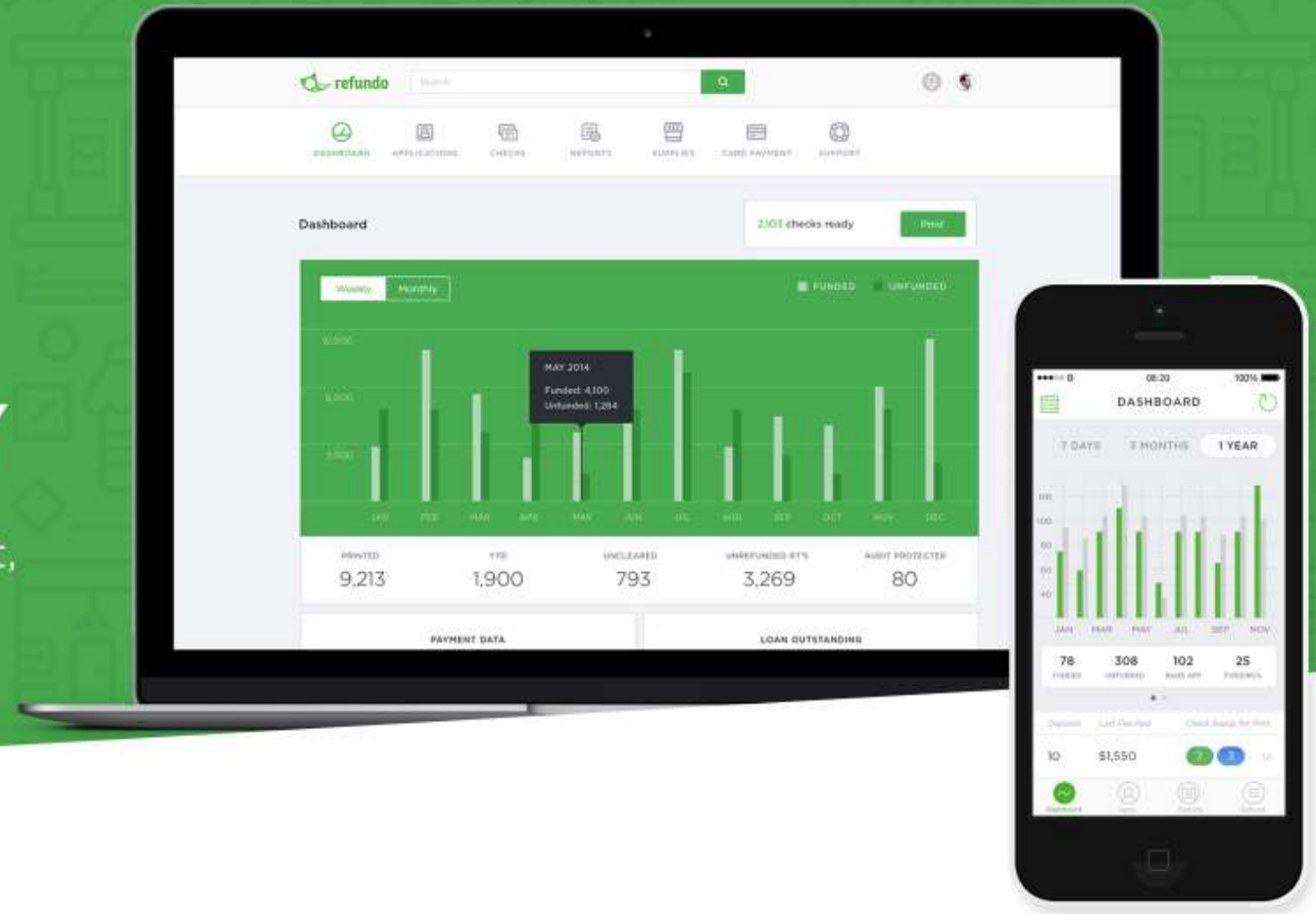







BANK PRODUCTS MADE EASY

Bank product software that is smart, powerful and stunningly simple.



#taxprotalk

Pay by Refund Transfer (RT)

-  Low-cost RT fee of \$34.95
-  Additional RTs \$10 (state or prior year)
-  Clients can choose from Direct Deposit, Check or Wal-Mart Direct2Cash to receive their refund

CheckSelect








- 🐟 Choose check stock from Capital One, BBT, Bank of the West and BBVA Compass
- 🐟 Low-cost and flat fee check cashing options nationwide (vary nationwide and branch locations)





LET'S TALK NOW

“NOW!” THE RAL ALTERNATIVE

-  Taxpayer advance starting are \$500 and \$1000 (refund thresholds for eligibility)
-  Advance of \$500 @ \$35 & \$1000 TBA
-  0% Interest...No Hidden Fees...0% Funny Business
-  Empower taxpayers to be financially independent
-  First year EROs and Taxpayers eligible for the NOW advance
-  Advance only available by Check and subsequent RT available by check or direct deposit
-  No prequalification criteria provided to software as all advances reviewed independently (exception processing)

Additional Features

Dashboard

View and share interactive reports, add team members with control access levels and more.

PlasticPay

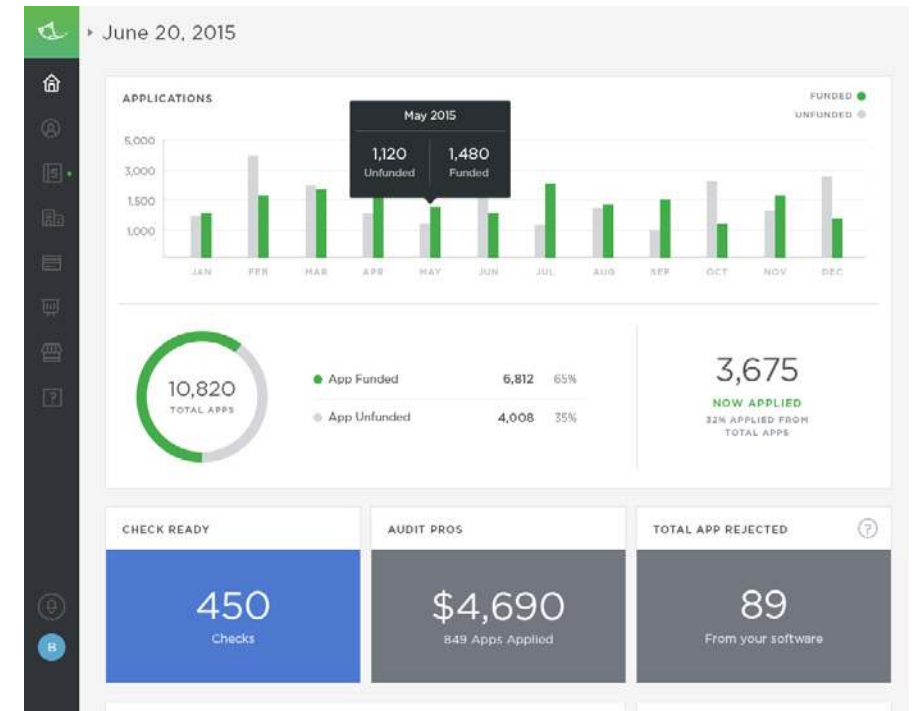
Built in credit card processing with no monthly fees. Just 2.9% + \$.30 per successful transaction.

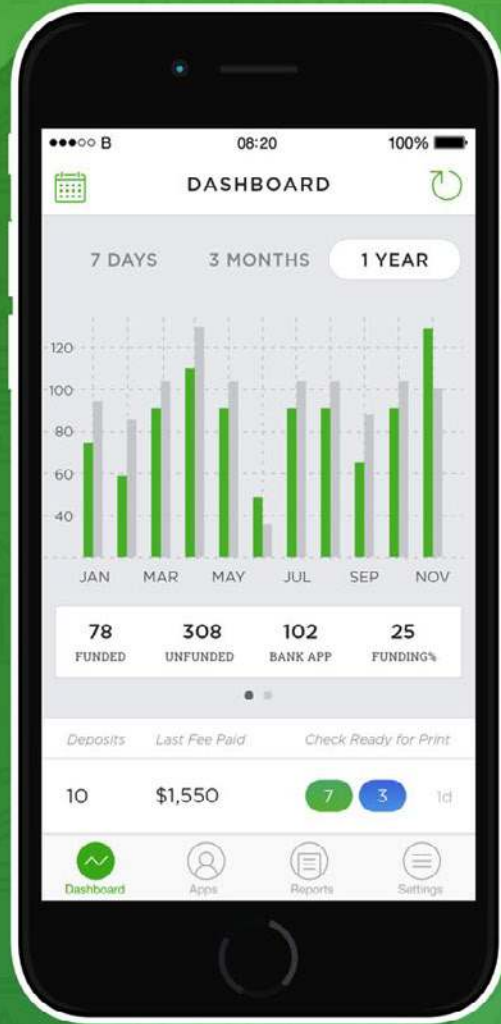
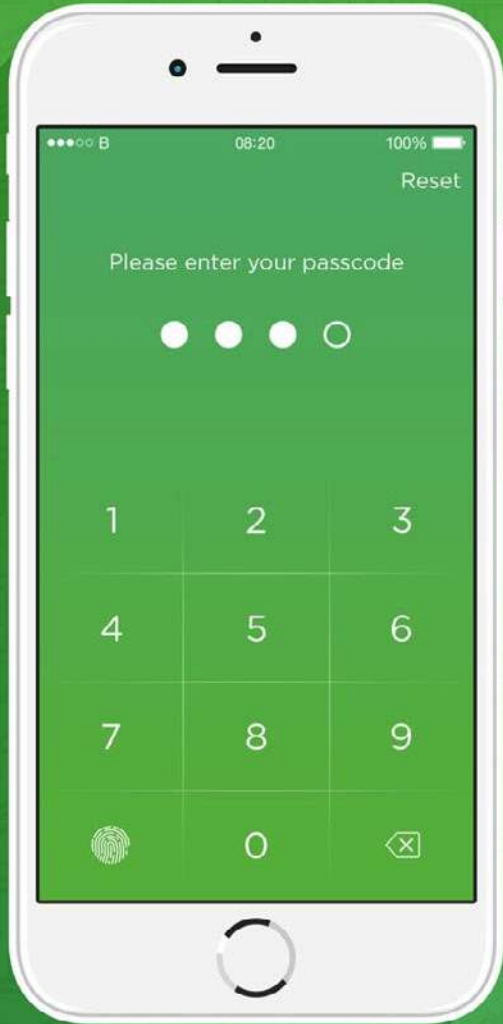
Dash

Access Dashboard anytime and anywhere with our mobile app version. Available on your desktop, phone or tablet.

Pre-Authorized Debit (PAD)

Collection of additional fees up to \$800 for repayment of additional services





08:20 100% B

APPLICATIONS

Chincilla, Roger

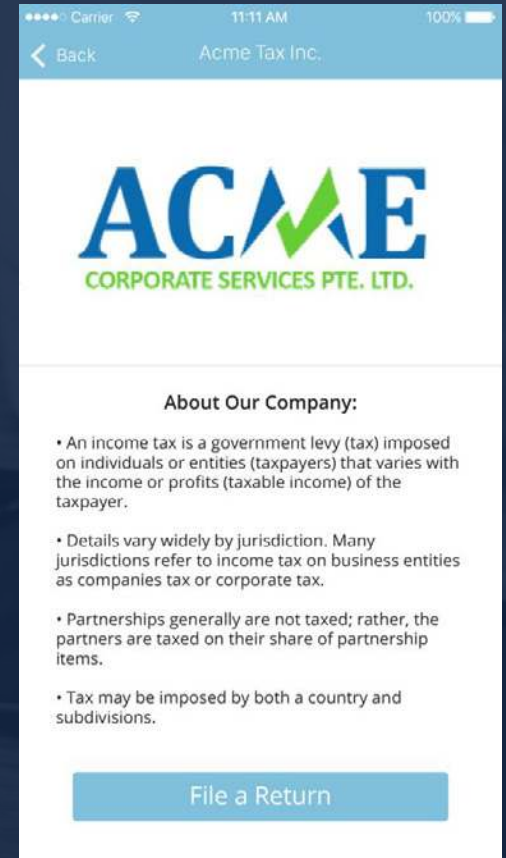
FUNDED VERIFIED

418-29-0192 SSN	05/02/1999 DOB
Refund Amount	\$3,500
Tax Preparation Fee	\$300
Processing Fee	\$50
Net Refund	\$3,150
Home Phone	(954)890-1234
Cell Phone	(954)890-1234

Dashboard Apps Reports Settings

CONNECT

- * Your own mobile app
- * Attract taxpayers from non-traditional channels
- * Combines convenience and expertise
- * Expand your reach to nearby taxpayers
- * App is customizable with your office branding
- * Taxpayer can scan and upload documents
- * Data imported right into your software
- * Chat with your clients from within the app







— INTRODUCING — AUDIT PROS

PROTECT YOUR CLIENTS AND YOUR TIME

- 🦋 Audit Assistance service for both, Federal and State
- 🦋 Assistance provided by tax professionals, CPAs and EAs
- 🦋 Coverage for up to 3 years after filing
- 🦋 Schedules A,C,&E Covered
- 🦋 Keep track of Audit Resolution in realtime
- 🦋 \$44.95 with incentives

Questions & Answers

-  Preparer Fees are limited to \$1100 BUT with PAD option of \$800 and Funded Verify Exceptions with taxpayer signed applications provided
-  FREE Initial shipment of Marketing Materials upon enrollment beginning in December. Additional Marketing Materials can be ordered from the Refundo Dashboard once enrollment is complete
-  Debit Cards not supported in 2016/2017 season
-  ERO Advances not supported in 2016/2017 season



refundo

www.refundo.com