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ComplyIQ

Capitalize on Your Compliance
complyiq.io

Is managing multiple client tax calendars a **never ending battle**?

Tax firms often rely on spreadsheets to manage tax operations for clients.

Typically shared across team members, that tax calendar spreadsheet is prone to human error and risk. Visibility to progress and collaboration with clients is low and it leaves you without a reliable audit trail.

Now imagine that multiplied across every client you support.

Replace your current tax calendar and client approval workflow with ComplyIQ.

Reduce the risk of fines and penalties that arise from late filings, incorrect payments, and more frequent audits.

Improve team efficiencies with complete visibility into filing times, workload, filing amounts, and more.

Eliminate the spreadsheet struggle that comes with managing clients manually.

Elevate collaboration through direct client access to approval workflows.

Showcase the value of your services with real-time reporting capabilities.

Boost client satisfaction and retention thanks to greater visibility and collaboration.

Ditch your tax calendars. Level up to **the command center** for tax operations.

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Step-by-Step Approval Workflow & Task Manager

- **Personalize our pre-configured templates** or configure your own to mirror your unique approval workflows
- **Automatically create the monthly work log** and easily roll everything over each year
- **Re-assign steps and tasks** temporarily or permanently as your workforce changes
- **Role-based visibility** and security into periodic tasks
- **Adjust standard due dates** with pre-built weekend & holiday logic
- **Collaborate inside the firm** with automated in-app notifications as steps are completed
- **Collaborate outside the firm** with external approver seats for your clients
- **Get escalating alerts*** to your inbox for near-term deadlines based on your risk tolerance
- **Leverage our library of excise and sales tax** returns, return due dates, and payment due dates

Risk Assessment & Performance Dashboard*

- **Understand workload** through the team reporting dashboard
- **Check your pulse** with a complete view of compliance activity status and health
- **Track critical stats** such as timeliness of completion, number of filings, amount paid, and more

* premium features