

Square Bidness Tax Pass™ — Office One-Pager

What Tax Pass™ Does

Tax Pass™ gives your tax office a clean digital front door. Clients submit IDs, W■2s, 1099s, and details from any phone using your branded intake link and unique office code.

How Clients Use It

1. Tap your intake link or scan your QR code.
2. Confirm name and mobile number.
3. Answer a few quick questions.
4. Upload photos of ID, W■2, or 1099 forms.
5. File goes straight into your office queue.

Office Benefits

- Fewer no-shows
- Cleaner client files
- No app install required
- Works with TaxSlayer, Drake, ProSeries, and more
- Status tracking for clients without calling the office

Pricing (Early Offices)

- Per-office or per-season pricing
- Pilot terms for the first season
- Custom setup for multi-location offices

Next Steps

- 15–20 minute discovery call
- Branding + office setup
- Pilot week with real clients

Contact

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