



**alternatives**

Tax Design Challenge

## introduction

Taxes can be a daunting task for most Americans. We're on a deadline. We're worried we might owe a lot of money. We're concerned we will make a mistake. We know that we could spend hours gathering documents, figuring out the numbers and filling out forms. Sometimes it just seems easier to hire an accountant or pay for a service to help.

The sense of security, time savings and assistance that tax preparation brands and companies like Turbo Tax, Jackson Hewitt, and H&R Block provide, ease our minds and help make the process easier. Taxpayers feel a level of trust that their return will be completed accurately and on time with a maximum return, but many cannot afford this luxury and are forced to go it alone.

## **opportunity**

What if, in the taxpayer experience of the future, the IRS was able to provide these services free of charge? What if taxpayers could feel that same level of trust as they do with paid preparer services? And what if more taxpayers could receive even greater benefits by using this new system?

We believe that the IRS can offer an improved taxpayer experience—one that makes the process easier, more understandable, more efficient and less intimidating. We believe that this opportunity could be available to all taxpayers rather than only to those who can afford a consultant or special service.

This new user experience can benefit taxpayers and well as the IRS.

## **benefits to the taxpayer**

- free service
- less time spent preparing taxes
- a filing assistant to facilitate easier filing
- accurately calculated taxes for a maximum refund
- ability to connect and manage personal finances to increase savings and financial stability
- ability to utilize personal tax records and financial information to achieve home ownership or other life goals

## **benefits for the IRS**

- improved communication with taxpayers
- improved accuracy and efficiency of returns
- improved perception of the IRS as a “partner” in filing

## the goal

The primary goal is to make it easier for people to manage their tax responsibilities, and use their own financial data to make informed and effective decisions about their personal finances. This can be achieved in the following ways:

- creating an online user experience that is friendly and easy to use for personal tax preparation
- providing free tax tools and services
- offering online planning tools and a user interface to manage and track personal finances
- offering a brand platform from the taxpayer perspective with a personality and interface that is easier to relate to
- offering the ability to use tax and financial data to plan for life changes, home ownership and other milestones that impact life goals

## **the concept**

Create an interface and personality for the IRS taxpayer user experience that is more relatable, easier to use and always accessible to help improve, evolve and change taxpayer interaction with, and perception of the IRS.

### **Public Perception Current State** ————— **Public Perception Future State**

Confusing ————— Helpful & Easy

Unreachable ————— Accessible

Faceless ————— Personal

Unfair ————— Fair & Efficient

Intimidating ————— Effective

# the solution

IRIS the Taxpayer Assistance Center Mobile Office

Friendly, relatable, helpful, knowledgeable and easily accessible.



## the solution

IRIS is the face of the Taxpayer Assistance Center mobile office. The branding and website design is clean, clear and friendly. The content is rich. A visual icon system and bold color palette allows users to identify and find what they need quickly and easily.

IRIS helps the taxpayer do more all in one place:

- make or schedule payments, check refund status, store tax records
- access and use the most up-to-date tax forms with an easier form identification system
- build a tax profile: taxpayers can take a short survey to help identify the tax forms and information that are right for them



# IRiS: The TAC Mobile Office

IRiS is your complete tax and financial solution

- a dedicated website and app for keeping tax records and tracking expenses, tools for planning your financial future, tax assistance and financial advice
- an online interface that allows taxpayers to input, scan, store or link tax information: W2, bank/investment statements, proof of health insurance documentation, donation and purchase receipts, tax forms, etc., for seamless tax preparation and financial planning
- a highly secure site with password protected account access where no one can access to your personal information—only you can generate a report to review and submit for filing taxes or other financial purposes

for more details please see link:  
<http://staging.altny.com/IRS>

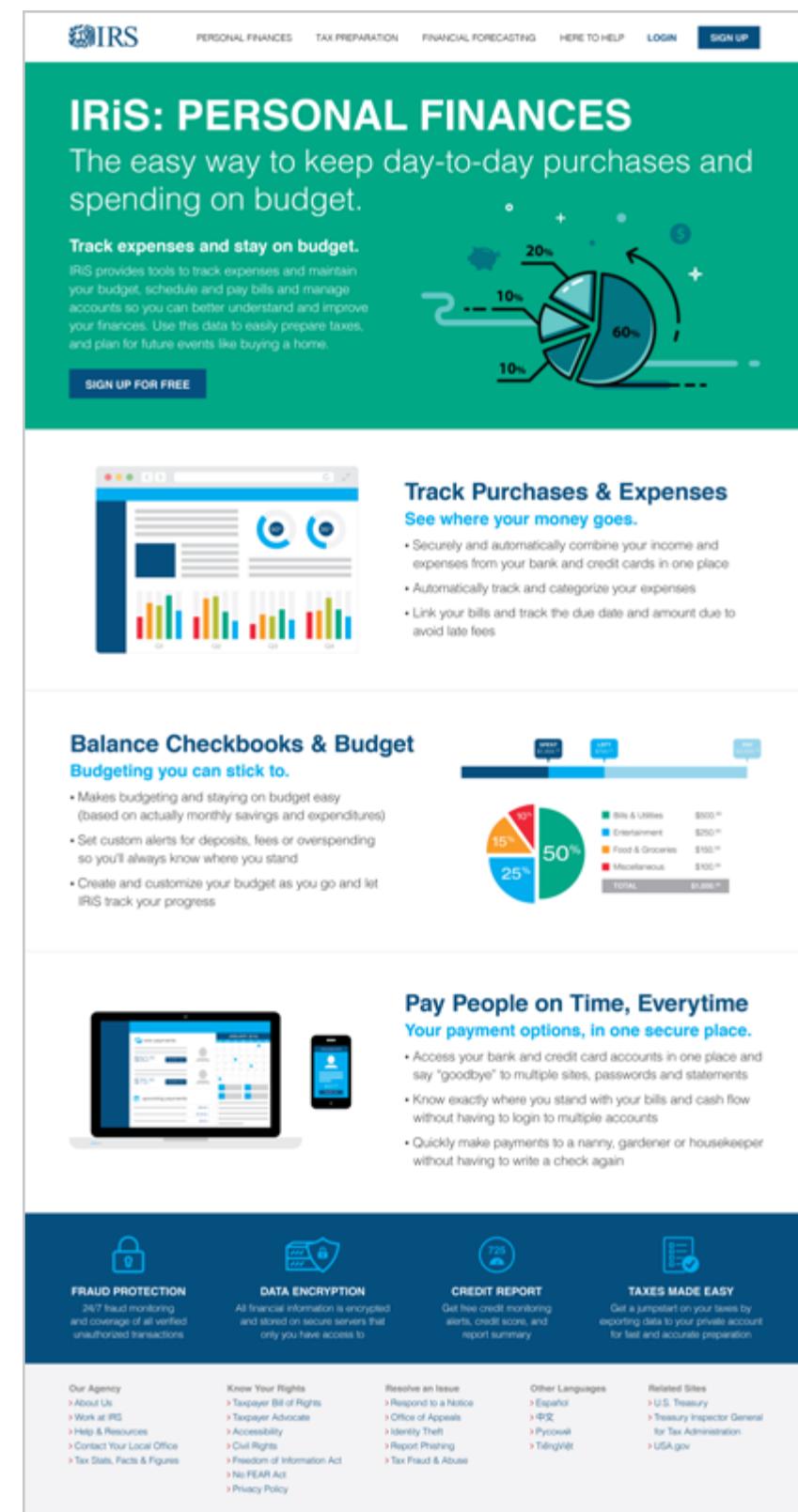
The screenshot shows the homepage of the IRiS website. At the top, there's a navigation bar with links for PERSONAL FINANCES, TAX PREPARATION, FINANCIAL FORECASTING, HERE TO HELP, LOGIN, and SIGN UP. The main title is "IRiS: THE TAC MOBILE OFFICE" with the subtitle "Your Complete Tax and Financial Solution". Below this, there's a section titled "Manage budgets and keep track of your finances in a private and secure place until you're ready to file." It features three icons: "Track expenses and stay on budget", "Easily prepare and file your tax return", and "Save and plan for the future". There are "SIGN UP FOR FREE" and "LOGIN TO YOUR ACCOUNT" buttons. To the right, there's a cartoon illustration of a woman holding a smartphone with a speech bubble saying "Hi! I'm IRiS, your tax and financial advisor." Below this, there are three main sections: "PERSONAL FINANCES" (Track expenses and stay on budget), "TAX PREPARATION" (Easily prepare and file your tax return), and "FINANCIAL FORECASTING" (Save and plan for the future). Each section has a brief description, a "LEARN MORE" button, and a corresponding icon. At the bottom, there are four footer sections: "FRAUD PROTECTION" (24/7 fraud monitoring and coverage of all verified unauthorized transactions), "DATA ENCRYPTION" (All financial information is encrypted and stored on secure servers that only you have access to), "CREDIT REPORT" (Get free credit monitoring alerts, credit scores, and report summary), and "TAXES MADE EASY" (Get a jumpstart on your taxes by exporting data to your private account for fast and accurate preparation). The footer also includes links for "Our Agency", "Know Your Rights", "Resolve an Issue", "Other Languages", and "Related Sites".

# IRiS: Personal Finances

IRiS provides tools to track expenses and budgets, schedule and pay bills and manage accounts so you can better understand and improve your finances. Use this data to easily prepare taxes, and plan for future events like buying a home.

- track purchases and expenses
- see when paychecks, bills and more are scheduled
- budgeting and saving tools and tracking
- automatic categorization of your spending
- sync data for fast and accurate tax preparation

for more details please see link:  
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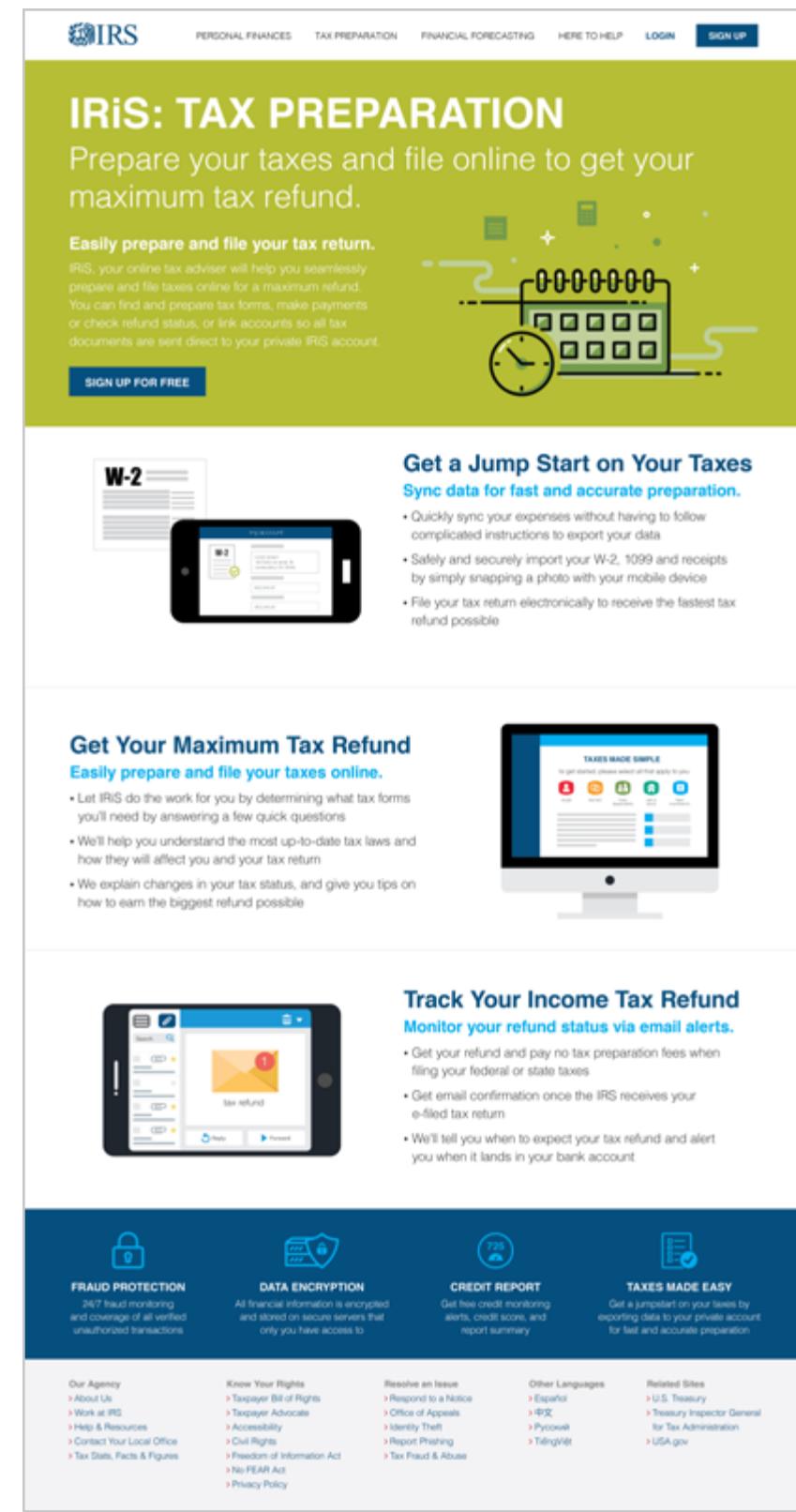
The screenshot shows the homepage of the IRiS: Personal Finances website. At the top, there's a navigation bar with links for PERSONAL FINANCES, TAX PREPARATION, FINANCIAL FORECASTING, HERE TO HELP, LOGIN, and SIGN UP. The main title "IRiS: PERSONAL FINANCES" is prominently displayed in a large, bold font. Below it, a sub-headline reads "The easy way to keep day-to-day purchases and spending on budget." A pie chart illustrates budget allocation: 60% for necessities, 20% for wants, and 10% for luxuries. A "SIGN UP FOR FREE" button is visible. The page is divided into several sections: "Track Purchases & Expenses" (with a bar chart and a list of features), "Balance Checkbooks & Budget" (with a budgeting chart and a list of features), "Pay People on Time, Everytime" (with a mobile device icon and a list of features), and "FRAUD PROTECTION", "DATA ENCRYPTION", "CREDIT REPORT", and "TAXES MADE EASY" sections at the bottom. Each section includes small icons and descriptive text.

# IRiS: Tax Preparation

IRiS, your online tax adviser will help you seamlessly prepare and file taxes online for a maximum refund. You can find and prepare tax forms, make payments or check refunds, or link accounts so all tax documents are sent direct to your IRiS account when you are ready to file.

- online and downloadable tax forms
- e-filing
- payments & refunds
- store records & scan receipts
- link accounts (investments, savings, retirement, etc.) so all tax documents are sent directly
- check audit risk
- find commonly overlooked tax deductions you may be entitled to

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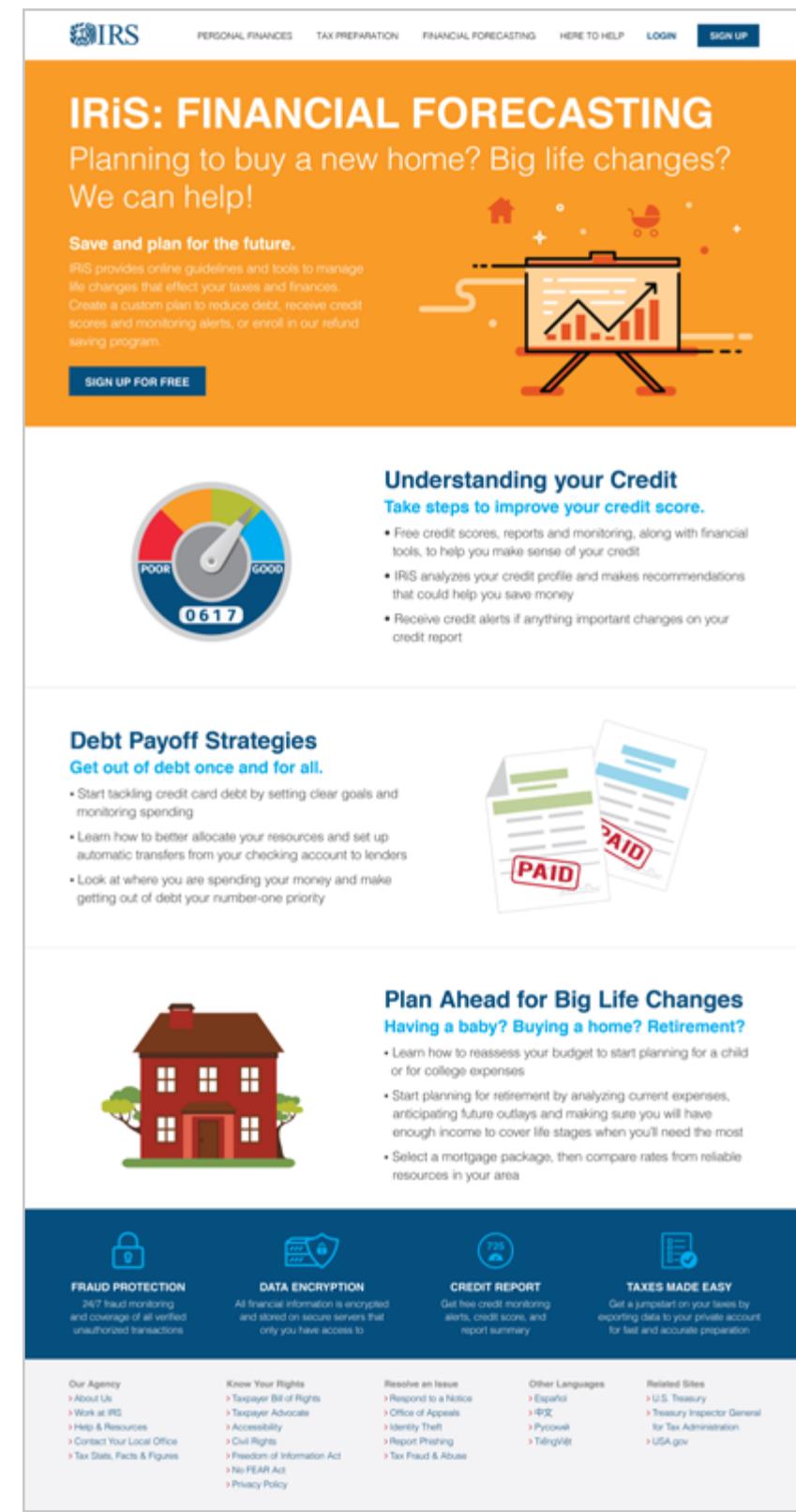
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# IRiS: Financial Forecasting

IRiS provides online guidelines and tools to manage life changes that effect your taxes and finances. Create a custom plan to reduce debt, receive credit scores and monitoring alerts, or enroll in our refund saving program.

- life change information and tips for managing: marriage, children, college, new employment, unemployment, home ownership, retirement, inheritance, estate planning, life insurance and death
- goal setting: set financial goals to help keep you on track
- refund savings program
- create a custom plan to reduce debt
- credit monitoring alerts, credit score & reports

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The screenshot shows the IRS IRiS: Financial Forecasting page. At the top, there's a navigation bar with links for PERSONAL FINANCES, TAX PREPARATION, FINANCIAL FORECASTING, HERE TO HELP, LOGIN, and SIGN UP. The main header is "IRiS: FINANCIAL FORECASTING" with the subtext "Planning to buy a new home? Big life changes? We can help!". Below this is a section titled "Save and plan for the future." which includes text about IRS providing online guidelines and tools to manage life changes, and a "SIGN UP FOR FREE" button. To the right is a graphic of a bar chart with a red arrow pointing up, surrounded by icons of a house, a baby carriage, and a plus sign. The next section is "Understanding your Credit" with the subtext "Take steps to improve your credit score." It features a credit score meter icon showing "POOR" on the left and "GOOD" on the right, with the number "0617" in the center. A list of benefits follows: Free credit scores, reports and monitoring, along with financial tools, to help you make sense of your credit; IRS analyzes your credit profile and makes recommendations that could help you save money; Receive credit alerts if anything important changes on your credit report. The third section is "Debt Payoff Strategies" with the subtext "Get out of debt once and for all." It lists three steps: Start tackling credit card debt by setting clear goals and monitoring spending; Learn how to better allocate your resources and set up automatic transfers from your checking account to lenders; Look at where you are spending your money and make getting out of debt your number-one priority. To the right is an illustration of two documents with the word "PAID" stamped on them. The fourth section is "Plan Ahead for Big Life Changes" with the subtext "Having a baby? Buying a home? Retirement?" It lists three steps: Learn how to reassess your budget to start planning for a child or for college expenses; Start planning for retirement by analyzing current expenses, anticipating future outlays and making sure you will have enough income to cover life stages when you'll need the most; Select a mortgage package, then compare rates from reliable resources in your area. At the bottom, there are four sections: "FRAUD PROTECTION" (24/7 fraud monitoring and coverage of all verified unauthorized transactions), "DATA ENCRYPTION" (All financial information is encrypted and stored on secure servers that only you have access to), "CREDIT REPORT" (Get free credit monitoring alerts, credit scores, and report summary), and "TAXES MADE EASY" (Get a jumpstart on your taxes by exporting data to your private account for fast and accurate preparation). The footer contains links for "Our Agency", "Know Your Rights", "Resolve an Issue", "Other Languages", and "Related Sites".

# IRiS: Here to Help

IRiS online support and dedicated staff are ready to help. Find resources, data, tax advice, check lists and reminders online to help you in preparing your tax return, financial planning and forecasting, speak directly to IRiS through our app, call to speak to an IRiS representative or visit our staff at TAC locations throughout the United States.

- tax advice and tips
- check lists & reminders
- instructions and videos
- online support and "IRiS" personal tax advisor on app (Siri type assistant)
- call center assistance
- TAC center assistance

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The screenshot shows the IRS website's "HERE TO HELP" section. It features a red header with the IRS logo and navigation links for PERSONAL FINANCES, TAX PREPARATION, FINANCIAL FORECASTING, HERE TO HELP, LOGIN, and SIGN UP. Below the header is a large red banner with the heading "IRiS: HERE TO HELP" and the subtext "Search our extensive database of tax tips, videos, and other resources." A graphic of a hand giving a thumbs up is on the right. A "Keep informed on the latest tax news" section includes a "SIGN UP FOR FREE" button. Another section titled "Learn from our Tax Resources" provides links to a forum, videos, and calculators. A "Taxpayer Assistance Centers" section shows a sign for a "Taxpayer Assistance Center" in Spanish. A "Download the Mobile App" section promotes the "TAC Mobile Office" app. At the bottom, there are four columns: FRAUD PROTECTION, DATA ENCRYPTION, CREDIT REPORT, and TAXES MADE EASY, each with a brief description and icons.

## **a new generation of taxpayers**

We've evolved into a society that increasingly does everything online. We bank, shop, listen to music, watch tv, learn, share and interact socially—all online. We rely on many apps that help us to do all of these things faster, easier and more conveniently.

As society shifts to all things digital and the baby boomer generation shrinks, the online user experience has become increasingly more important. The majority of present and future taxpayers are millennial who are very connected and have come to expect a simple and fast way to get the information or job done online.

**75.4 million**  
US population ages  
18 to 34 in 2015

**“Millennials have surpassed Baby Boomers as the nation’s largest living generation.”**

—Pew Research Center, April 2016

## a new generation of taxpayers

**“For most of this generation, in other words, the digital revolution does not represent disruption. It represents the norm and, to a significant degree, their generation’s opportunity. Perhaps as a consequence, few Millennials are worried much about privacy, and particularly not about the data kept by government or corporations.”**

—“Digital lives of Millennials,” Pew Research Center, April 2016

**“This generation may also be burdened with a staggering amount of student debt, and have had difficulty finding a job or boosting their salaries during and after the Great Recession. All those factors mean that the financial strategies that worked for their Boomer or Gen X parents, may not work for them.”**

—“For Millennials Goal is Financial Freedom,” USA Today, April 2015

Based on these societal changes, the viability and need for a new user experience for taxpayers online is imminent and the IRS should be at the forefront of delivering it.

## **Thank you!**

We appreciate your consideration, and as taxpayers, look forward to utilizing a progressive, efficient and cost-saving platform such as IRIS that meets our financial needs.

## **alternatives**

We specialize in building brands, companies and organizations through creative design and strategic marketing across all forms of brand, media and retail communication.

**alternatives** 223 w 29th street new york, ny 10001 212 239 0600 [altny.com](http://altny.com) [info@altny.com](mailto:info@altny.com)

# IRIS: THE TAC MOBILE OFFICE

## Your Complete Tax and Financial Solution

Manage budgets and keep track of your finances in a private and secure place until you're ready to file.

The Taxpayer Assistance Center mobile office gathers all your financial information into your private account, giving you the whole picture in a way that's easy to understand and take advantage of by tracking your spending patterns, investments and more for fast and accurate tax preparation.



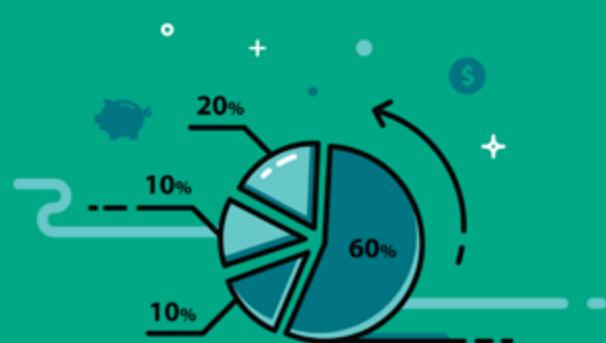
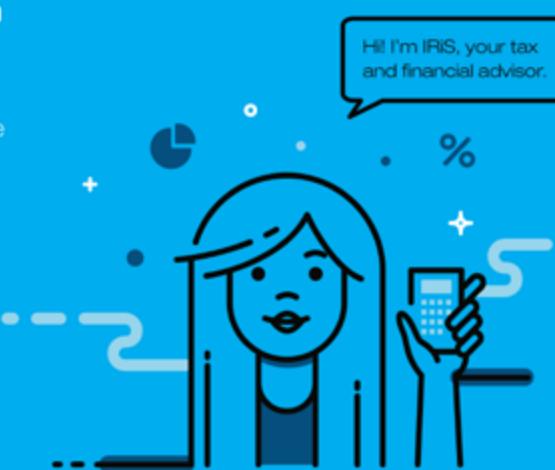
Track expenses and stay on budget



Easily prepare and file your tax return



Save and plan for the future

[SIGN UP FOR FREE](#)[LOGIN TO YOUR ACCOUNT](#)

### PERSONAL FINANCES

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- > Taxpayer Advocate
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- > Civil Rights
- > Freedom of Information Act
- > No FEAR Act
- > Privacy Policy

##### Resolve an Issue

- > Respond to a Notice
- > Office of Appeals
- > Identity Theft
- > Report Phishing
- > Tax Fraud & Abuse

##### Other Languages

- > Español
- > 中文
- > Русский
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##### Related Sites

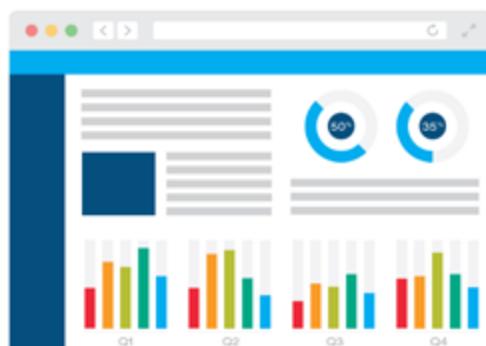
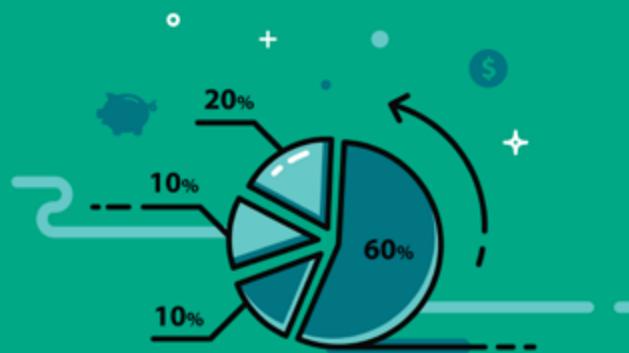
- > U.S. Treasury
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# IRIS: PERSONAL FINANCES

The easy way to keep day-to-day purchases and spending on budget.

## Track expenses and stay on budget.

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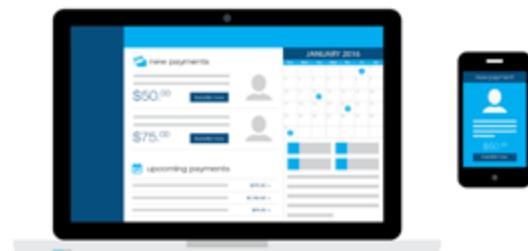
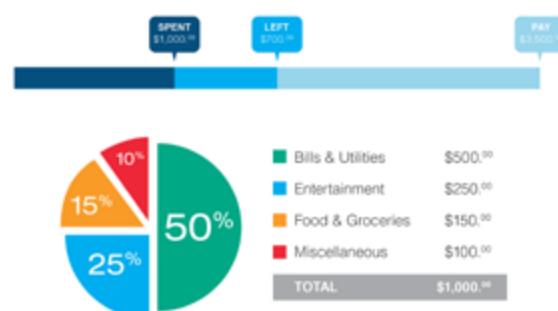
### See where your money goes.

- Securely and automatically combine your income and expenses from your bank and credit cards in one place
- Automatically track and categorize your expenses
- Link your bills and track the due date and amount due to avoid late fees

## Balance Checkbooks & Budget

### Budgeting you can stick to.

- Makes budgeting and staying on budget easy (based on actual monthly savings and expenditures)
- Set custom alerts for deposits, fees or overspending so you'll always know where you stand
- Create and customize your budget as you go and let IRIS track your progress



## Pay People on Time, Everytime

### Your payment options, in one secure place.

- Access your bank and credit card accounts in one place and say "goodbye" to multiple sites, passwords and statements
- Know exactly where you stand with your bills and cash flow without having to login to multiple accounts
- Quickly make payments to a nanny, gardener or housekeeper without having to write a check again



#### FRAUD PROTECTION

24/7 fraud monitoring and coverage of all verified unauthorized transactions



#### DATA ENCRYPTION

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PERSONAL FINANCES

TAX PREPARATION

FINANCIAL FORECASTING

HERE TO HELP

LOGIN

SIGN UP

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Prepare your taxes and file online to get your maximum tax refund.

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## Get a Jump Start on Your Taxes

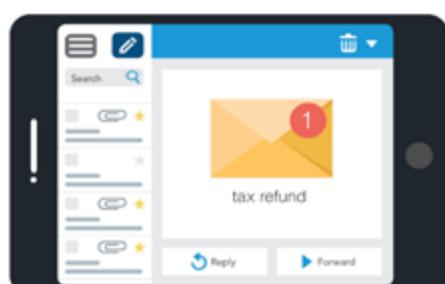
### Sync data for fast and accurate preparation.

- Quickly sync your expenses without having to follow complicated instructions to export your data
- Safely and securely import your W-2, 1099 and receipts by simply snapping a photo with your mobile device
- File your tax return electronically to receive the fastest tax refund possible

## Get Your Maximum Tax Refund

### Easily prepare and file your taxes online.

- Let IRiS do the work for you by determining what tax forms you'll need by answering a few quick questions
- We'll help you understand the most up-to-date tax laws and how they will affect you and your tax return
- We explain changes in your tax status, and give you tips on how to earn the biggest refund possible



## Track Your Income Tax Refund

### Monitor your refund status via email alerts.

- Get your refund and pay no tax preparation fees when filing your federal or state taxes
- Get email confirmation once the IRS receives your e-filed tax return
- We'll tell you when to expect your tax refund and alert you when it lands in your bank account



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# IRiS: FINANCIAL FORECASTING

Planning to buy a new home? Big life changes?  
We can help!

## Save and plan for the future.

IRiS provides online guidelines and tools to manage life changes that effect your taxes and finances. Create a custom plan to reduce debt, receive credit scores and monitoring alerts, or enroll in our refund saving program.

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## Understanding your Credit

### Take steps to improve your credit score.

- Free credit scores, reports and monitoring, along with financial tools, to help you make sense of your credit
- IRiS analyzes your credit profile and makes recommendations that could help you save money
- Receive credit alerts if anything important changes on your credit report

## Debt Payoff Strategies

### Get out of debt once and for all.

- Start tackling credit card debt by setting clear goals and monitoring spending
- Learn how to better allocate your resources and set up automatic transfers from your checking account to lenders
- Look at where you are spending your money and make getting out of debt your number-one priority



## Plan Ahead for Big Life Changes

### Having a baby? Buying a home? Retirement?

- Learn how to reassess your budget to start planning for a child or for college expenses
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- Select a mortgage package, then compare rates from reliable resources in your area



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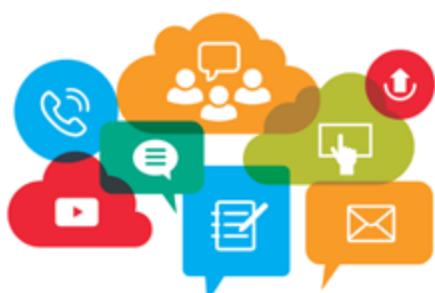
SIGN UP

# IRiS: HERE TO HELP

Search our extensive database of tax tips, videos, and other resources.

## Keep informed on the latest tax news.

IRiS online support and dedicated staff are ready to help you. Find resources, data, tax advice, check lists and reminders online to help you in preparing your tax return, financial planning and forecasting, speak directly to an IRiS representative or visit a TAC office location across the United States.

[SIGN UP FOR FREE](#)

## Learn from our Tax Resources

### Get answers to your tax questions.

- Search our online [forum](#) where you can ask questions, find tips from taxpayers and share your experience
- Watch short and informative [videos](#) on a number of tax-related topics in English, Spanish and American Sign Language (ASL)
- Estimate your tax refund, health care credit or paycheck withholding with our [calculators](#)

## Taxpayer Assistance Centers

### Your source for personal tax help.

- Schedule an appointment to visit your local TAC when you believe your tax issue cannot be handled online or by phone
- Take advantage of free tax preparation through a Volunteer Income Tax Assistance/Tax Counselor
- Our TAC professionals take great care to only discuss your personal information with you or someone you authorize to speak on your behalf



## Download the Mobile App

### IRiS: The TAC Mobile Office

- On-demand support from IRiS your intelligent personal tax and financial advisor and knowledge navigator
- Snap and store receipts, forms, records and documentation to easily track important purchases and complete your taxes
- The only app for keeping tax records, tracking expenses, budget, financial planning and more



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All financial information is encrypted and stored on secure servers that only you have access to



#### CREDIT REPORT

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#### Our Agency

- > About Us
- > Work at IRS
- > Help & Resources
- > Contact Your Local Office
- > Tax Stats, Facts & Figures

#### Know Your Rights

- > Taxpayer Bill of Rights
- > Taxpayer Advocate
- > Accessibility
- > Civil Rights
- > Freedom of Information Act
- > No FEAR Act
- > Privacy Policy

#### Resolve an Issue

- > Respond to a Notice
- > Office of Appeals
- > Identity Theft
- > Report Phishing
- > Tax Fraud & Abuse

#### Other Languages

- > Español
- > 中文
- > Русский
- > Tiếng Việt

#### Related Sites

- > U.S. Treasury
- > Treasury Inspector General for Tax Administration
- > USA.gov