

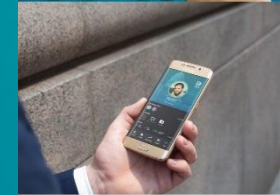
TAXES MADE SIMPLE

***Empowering the taxpayer,
one swipe at a time***

Corey Jones, Ben Burgess & Jeremy Marcus



**REVOLUTIONIZING
THE IRS TAX
EXPERIENCE**



TAXES ON THE GO

Update your profile anywhere
anytime. Stay connected.

SECURE LOGIN

Security is number one, safe login
everytime with smartphone thumbprint
technology integration.



CROSS PLATFORM API INTEGRATIONS MADE EASY

Working to integrate everyday tools to revolutionize
your tax filing experience. Taxes made simple.



[See all partners](#)

PROFILE DASHBOARD



Build your profile and
stay connected.

SECURE FILE VAULT



Secure vault allows you to upload files
easily using our smart capture.
Fast, Simple and Safe.

SIMPLE 3 STEP FILING



Once your profile is complete you
can file your taxes in 3 swipes.
Easy as 1, 2, 3.



Click the landing page to
explore it further

Revolutionizing Taxpayer Expectations



The taxpayer no longer set their expectation of the IRS against their experience with other federal agencies; rather, the taxpayer expects the IRS to be on par or better than leading experience companies like Apple.



Direct Competitors

Products or services that directly compete with yours



Experiential Competitors

Experiences that set expectations across industries and agencies



Perceptual Competitors

Companies that change customer expectations

90% Of U.S. citizens expect experiences and customer service to be “as good or better” than commercial firms

How the IRS can Re-imagine the Taxpayer Experience



Move beyond the transactional relationship of the past to deliver a deep partnership with the taxpayer, supporting their role in shaping America's future by providing **engaging end-to-end tax experiences for the people, by the people**

Themes to enable the IRS' future state vision

Simple

Intuitive

Delightful

Empowering

Secure

Digital 1st

Mobile 1st

Accessible

Transparent

Accurate

65%

Of taxpayers who used a tax intermediary to file their taxes cited a lack of tax knowledge as a main reason to employ a tax professional

75%

Of U.S. taxpayers express an interest in using digital services

Concepts Illustrating the Future Journey



We can bring the future state to life through a mobile app and secure API ecosystem designed to provide a digital-first, end-to-end experience for the taxpayer

Key Experience Features

- **Smart Suggestions:** Through progressive profiling and evolving our knowledge of the taxpayer, the app will push notifications on what documents need to be filled out based on the learned taxpayer's needs
- **iConnect:** Through a secure API ecosystem, the app will allow the taxpayer to connect to other financial services (e.g., Mint.com) to allow for automatic importing and categorization of relevant expense transactions
- **iFilingVault:** The app provides a robust and secure document repository to allow for the e-storage of relevant tax material not just during the traditional tax return time (March and April), but throughout the entire calendar year
- **EZFiling:** Through the aggregation of relevant tax documents and information throughout the year, the app provides an easy 3-step process to file your taxes*

*See Appendix for our approach to 3-Step Filing

Taxpayer Journeys



Protect Me

Lisa

Concerned about identity-theft as a single-mother, Lisa uses the new IRS app's secure, biometric login process to set up her profile



Partner with Me

Jorge

Using the new IRS app's *iFilingVault* feature, Jorge tracks all of his business expenses throughout the year in 1 central location



3 Swipes

Klay & Meg

After connecting their Mint.com account to the new IRS app earlier in the year, Klay & Meg pay their taxes in 3 easy swipes

Concept: Protect Me



Lisa

- 36 years-old
- Single-mother
- Earns \$95k per year as a digital marketer and receives a W-2
- Her taxes are relatively straightforward, outside of some child-related expenses

Challenges

Being a single-mother, Lisa is very concerned about security and identity theft

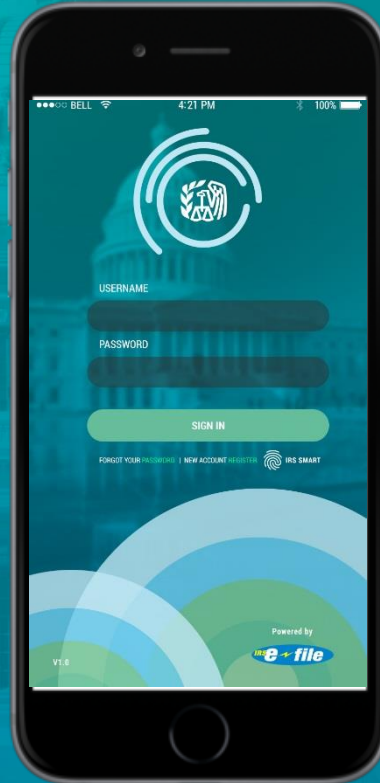
She also has very little free time (and patience) to do her taxes

She's heard rumors of hackers using off-the-shelf e-tax return software and is hesitant to e-file

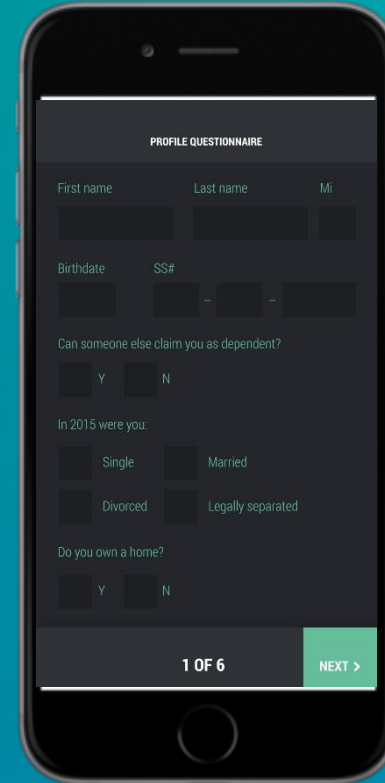
Concept: Protect Me (cont'd)



Lisa uses the thumbprint technology of her iPhone to create her account. The next day, Lisa spends less than 5 minutes filling out her app profile, finding the design easy to use and engaging. After filling out her profile, Lisa's tax dashboard is generated, allowing her to find all of her tax tools with 1 touch.



Taxpayer Registration & Login



Build Your Profile



Secure Tax Dashboard

Key Takeaways

- Secure login
- Opportunity to build your profile over time as you gain confidence with the app
- Intuitive design reduces time spent learning how to use the app
- Engaging display of key TDD fields

Concept: Partner with Me



Jorge

- 25 years-old
- Single
- Spanish is his primary language
- Earns \$45k per year as a landscape crew lead
- His taxes are complicated because he accumulates business expenses throughout the year, with a spike in volume coming during the summer

Challenges

With Spanish being Jorge's primary language, he doesn't know how or where to get tax help

He immigrated to the U.S. 6 years ago, so his knowledge of the tax system is limited

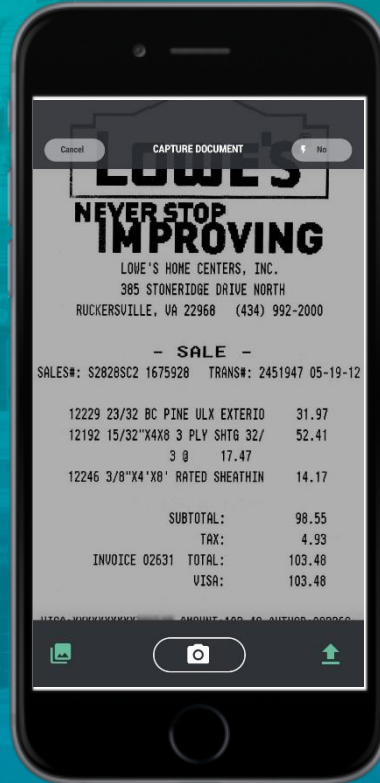
Because he is unfamiliar with the tax code, he misses filing for deductions he deserves

As a crew lead, he is responsible for buying work supplies, so he has business expenses he needs to keep track of throughout the entire year

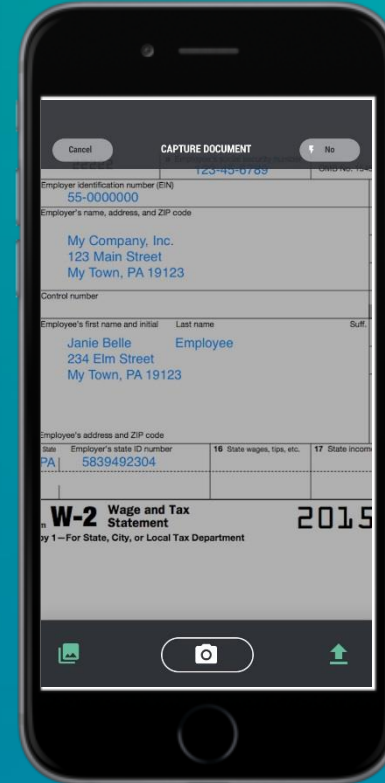
Concept: Partner with Me (cont'd)



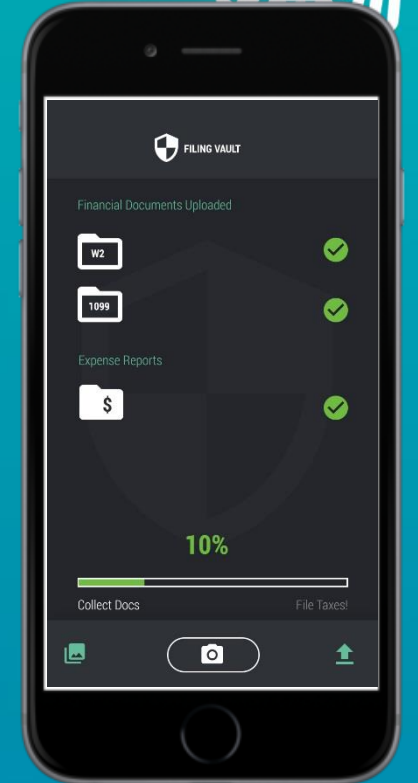
Before heading the job site, Jorge goes to Lowe's to pick up some work supplies. Instead of sticking the receipt in the glove box of his truck like he normally does, Jorge takes a picture of his receipt and the app parses out the data, filing it into his "work supplies" expense category. While he currently has the app in its default English-text setting, before filing his taxes, Jorge will switch his language preference to Spanish.



**Real-Time
Expense Tracking**



**W-2
Import**



iFilingVault

Key Takeaways

- Track expenses in real-time, extending and deepening the relationship with the IRS
- Once captured, expenses are categorized, aggregated and stored in a secure lockbox
- Expense capture can move past just "click-and-shoot" feature by tying in IoT items (e.g., mileage car trackers)

Concept: 3 Swipes



Klay & Meg

- Married couple, early 40's
- Both work 9-5 jobs and have 2 children
- Combined, they make more than \$150k per year
- In the past, they used a tax professional to file their taxes; this year, they want to save some \$ and file on their own

Challenges

Klay and Meg were unhappy with how much it costs to use a tax professional and didn't feel like they were getting a good return on their investment

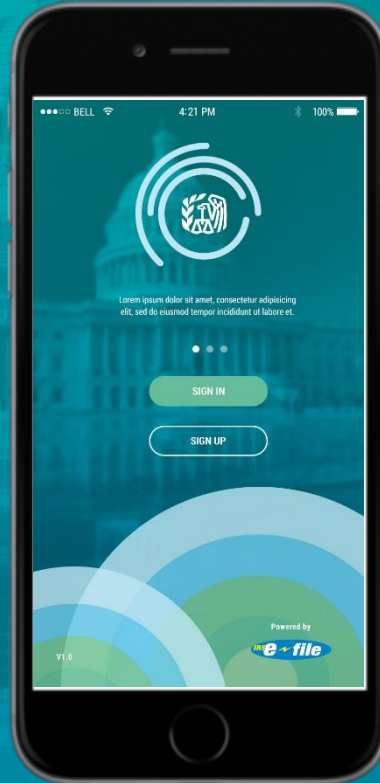
Given their exposure to the corporate world, they have high experience expectations

They currently view the IRS as a once-a-year transaction who they only hear from outside of that singular event if they did something wrong

Concept: 3 Swipes (cont'd)



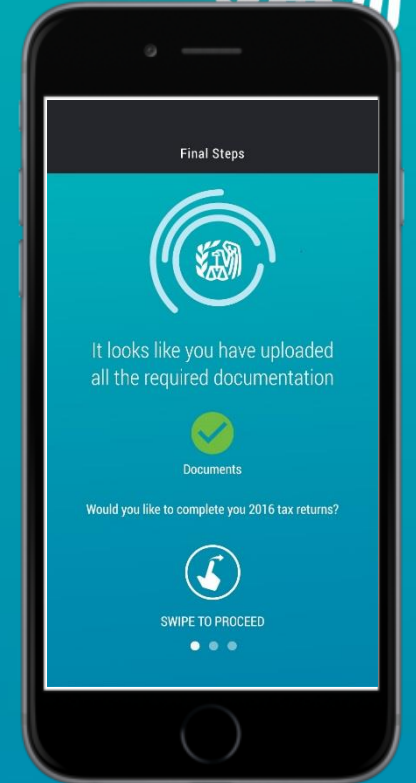
From her desk at work, Meg signs into the app. She checks to see that through October, her and Klay have uploaded 60% of their necessary tax documentation. She texts Klay to have him connect their TD Ameritrade account to the app when he gets home from work. After receiving their W-2's in January, Klay and Meg sit down together to start the 3-step filing process before going out to dinner.



Sign-In



Check Your Filing Status



Begin 3-Swipe Filing Sequence

Key Takeaways

- Shared accounts for married couples who file jointly
- Status tracker to see your level of tax filing preparation
- 3-Step check-out sequence to make filing taxes easy, simple and fun

Appendix



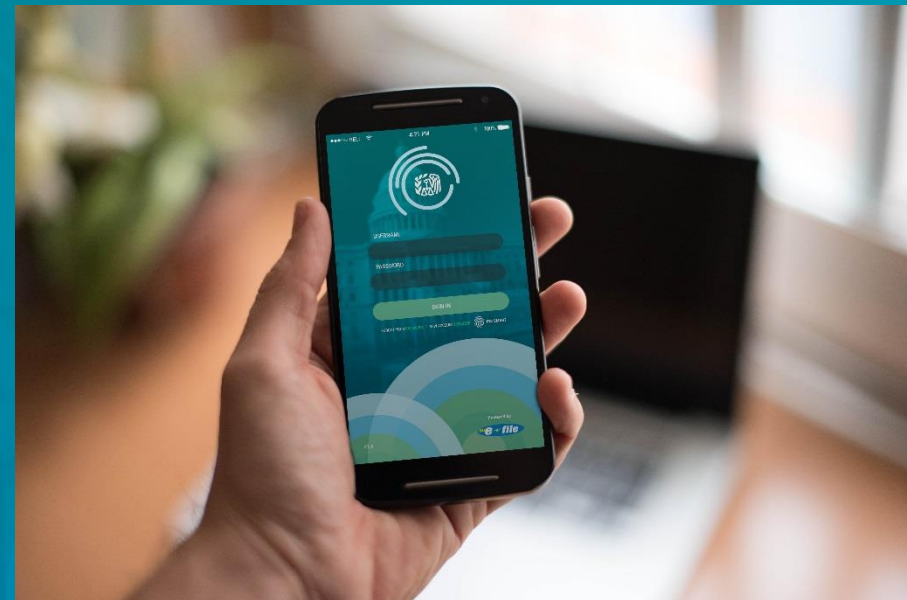
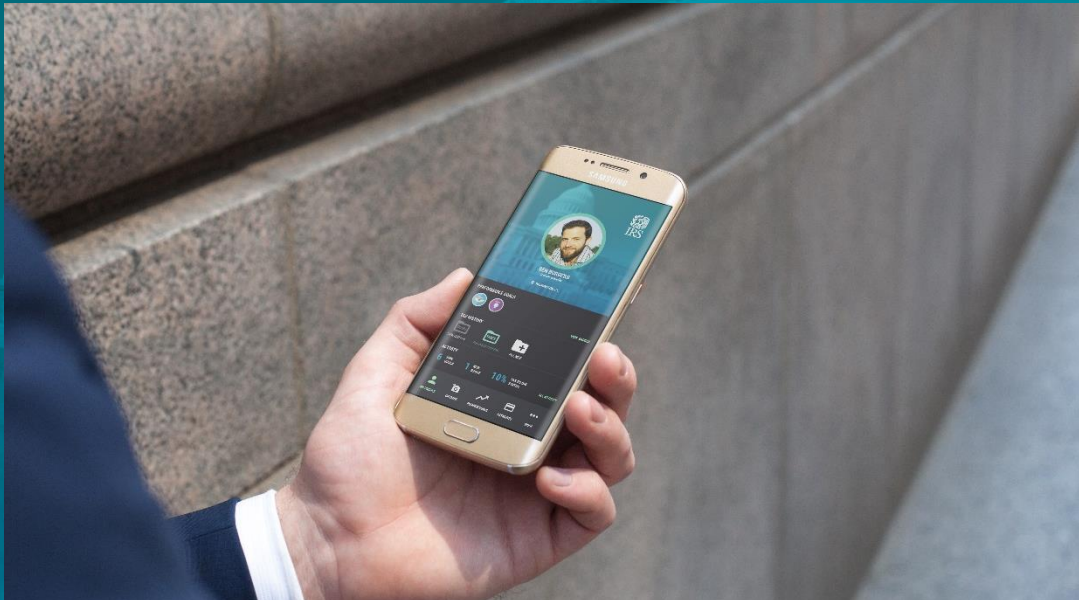
Appendix: Wireframes



To experience the wireframes in a more dynamic setting, please visit these links:

[Tax Challenge Wireframes](#)

[Tax Challenge Landing Page](#)



Appendix: 3-Step Filing



Great artists are often inspired by their contemporaries and to achieve 3-step filing, our process was no different

We can cherry-pick from the best-in-class customer experiences to create a simple, but powerful experience tailored to the individual taxpayer.

App Requirement	Experience to Emulate
Intake user profile data to inform users of what documents they will need to file and expenses they may deduct	TurboTax's simple question/answer experience to determine the necessary tax forms to file and deductions to claim
Enable users to securely store and access those documents throughout the year	DropBox's robust, intuitive, accessible and secure cloud storage platform
Simply, securely filing their taxes and waiting for their return to show up in their account	Amazon's Click-to-Buy for convenience paired with Apple Pay fingerprint protocol for security.