GruntWorx

Smarter Tax Automation

GruntWorx takes the grind out of tax prep and can significantly enhance tax representation services for accountants by streamlining the compliance and documentation processes that are foundational to effective resolution work. GruntWorx is designed to automate the organization and data entry of tax documents. It integrates seamlessly with leading tax software, making it an invaluable tool for tax professionals who want to improve efficiency, accuracy, and workflow challenges.

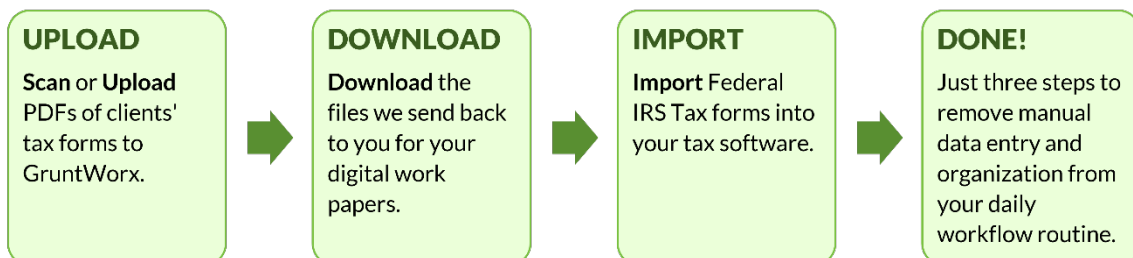## 1. Automating Preparation and Enabling Compliance Work

Tax prep and representation often begin with getting clients compliant—filing current and prior-year returns, organizing financial records, and preparing documentation for IRS resolution. GruntWorx automates:

- **Document organization**: Converts client-submitted files into standardized, bookmarked PDFs. GruntWorx automatically organizes these documents into a standardized format. This eliminates the need for manual sorting and ensures that all documents are consistent with all clients and easily accessible.

- **Data extraction**: Uses OCR to pull information from current year W-2s, 1099s, K-1s, and more.

- **Population into tax software**: Seamlessly integrates with platforms like UltraTax CS®, Intuit Lacerte®, CCH Axcess™, Intuit ProSeries® Tax, CCH ProSystem fx®, Drake Tax® and GoSystem Tax RS®.

This automation allows accountants to focus on strategic resolution work and prior year returns rather than repetitive data tasks.

Smarter Tax Automation

UPLOAD	DOWNLOAD	IMPORT	DONE!
Scan or **Upload** PDFs of clients' tax forms to GruntWorx.	**Download** the files we send back to you for your digital work papers.	**Import** Federal IRS Tax forms into your tax software.	Just three steps to remove manual data entry and organization from your daily workflow routine.

2. Supporting Multi-Year Workpaper Needs

Tax representation cases often require filing six years of returns to establish compliance. GruntWorx helps by:

- Processing large volumes of documents quickly. Submit each set of documents to GruntWorx ORGANIZE to have a digital workpaper created so you can easily prepare the prior year returns.

- Handling complex data sets (e.g., $1.4M in 1099-B transactions). Use GruntWorx Trades when the client has prior year brokerage statements and 1099-Bs to be populated into the Schedule D.

- Allowing re-submission of late-arriving documents without disrupting workflow. Send additional documents to GruntWorx when needed.

This is especially valuable for Offer in Compromise, audit defense, and innocent spouse relief cases.

3. Enhancing Accuracy and Reducing Risk

GruntWorx's verification services and OCR technology reduce transposition errors and ensure data integrity. This is critical when preparing IRS forms where accuracy directly impacts resolution outcomes.

- **Review and Adjust:** Tax professionals can review the populated data and make any necessary adjustments. This step ensures that the final tax return is accurate and complete.

- **Data Verification:** The extracted data is then verified for accuracy. GruntWorx cross-references the information with known data points to ensure that there are no discrepancies. To save time and resources, tax preparers use the GruntWorx verification service, where our U.S.-based staff processes and reviews your data for accuracy, providing a fully automated solution.

4. Empowering Staff and Scaling Operations

GruntWorx enables firms to delegate data entry to administrative staff, freeing up licensed professionals for higher-value tasks. As Tracy Cook, CPA, noted:

> *"Anything I can offload to lower-cost admin time is a win."*

This scalability is essential for firms handling multiple representation cases simultaneously.

5. Improving Client Experience

Clients in tax resolution are often stressed and overwhelmed. GruntWorx helps firms deliver faster turnaround times and organized documentation, which builds trust and confidence.

> *"GruntWorx is priceless. I can focus on compliance and client needs*
> *while GruntWorx handles the basics."*
>
> — *Felecia Dixson, EA, CTRC, ATA*

6. Workflow Integration

GruntWorx fits seamlessly into a tax prep workflow:

1) Pre-screen & organize documents

2) Upload to GruntWorx

3) Review output files

4) Import into tax software

5) Finalize and archive

This structure supports consistent, repeatable processes that streamline your tax prep business and are essential for managing resolution cases efficiently.

7. Security and Compliance

GruntWorx is SSAE 16 SOC 2 Type 1 compliant and adheres to IRC Section 7216, ensuring that sensitive client data is handled securely and legally—an absolute must in representation work.

Benefits of Using GruntWorx

Time Savings

- **Efficiency:** By automating the data entry and organization process, GruntWorx saves tax professionals countless hours during tax season. This allows them to focus on more complex tasks and client interactions.

- **Quick Turnaround:** GruntWorx staff reviews client returns within a matter of hours—often even sooner—ensuring you maintain full control over your time.

Time Savings

Traditional Practice		With Automation	
		10%	Implementing Automation In Your Workflow
Document Gathering/Organization/Data Entry	55%	15%	Document Gathering/Organization/Data Entry
Electronic Document Filing	20%	15%	Electronic Document Accuracy Check/Filing & Finished Document Storage
Finished Document Storage	15%		
Client Communication & Return Delivery	10%	60%	Work Toward Business Growth, Build Clientele and Rapport, & Focus on More Complex Parts of the Return

Advanced Automation takes a portion of your daily tasks off your shoulders.

Accuracy and Compliance

- **Reduced Errors:** The use of OCR technology and data verification significantly reduces the likelihood of errors in the tax preparation process.

- **Compliance:** GruntWorx ensures that all data is handled securely and in compliance with relevant regulations, protecting sensitive client information.

Cost Savings

- **Reduced Labor Costs:** By automating the "grunt work" of tax preparation, GruntWorx reduces the need for hiring additional staff during peak seasons.

- **Flexible Pricing:** GruntWorx offers Variable Pricing, or for those that qualify, Return-Based Plans, allowing firms to scale their usage based on their needs without incurring unnecessary costs. There are no sign-up costs, renewal fees, or training costs.

Cost Savings

Estimated Cost of Hiring 1 Data Entry Clerk/Admin for 4 Months:				
($20/hr @ 40 hrs/week for 4 months) + (20 hrs OT x 4 weeks)				$15,200

Level of Service Product & Add Ons	# of Pages	$ per Return	# of Returns	Total $ Spend
VERIFIED Organize	30	$13.50	50	$675
VERIFIED Populate	20	$29	250	$7,250
VERIFIED Trade Details	100 Trade Lines	$25	25	$625
VERIFIED Trade Summary	2 Brokerages	$10	50	$500
	300 RETURNS – TOTAL ESTIMATED $ SPEND			$9,050

Security & Compliance Measures

GruntWorx prioritizes the security and compliance of client data through several robust measures.

Security Measures

- **SSAE 16 SOC 2 Type 1 Compliance:** GruntWorx has achieved SSAE 16 SOC 2 Type 1 compliance, which is a rigorous standard for information security. This certification ensures that GruntWorx's systems and processes meet stringent criteria for security, availability, processing integrity, confidentiality, and privacy.

- **Data Encryption:** All data transmitted and stored by GruntWorx is encrypted using industry-standard encryption protocols. This ensures that sensitive information is protected from unauthorized access.

- **Secure Data Centers:** GruntWorx uses secure data centers that are equipped with advanced physical and digital security measures. These data centers are monitored 24/7 to prevent any security breaches.

Compliance Measures

- **IRC Section 7216 Compliance:** GruntWorx complies with IRC Section 7216, which governs the use and disclosure of tax return information. Tax professionals using GruntWorx do not need to obtain written consent from clients to use or disclose tax data, as GruntWorx provides an auxiliary service in connection with the preparation of tax returns.

- **Regular Audits and Assessments:** GruntWorx undergoes regular audits and assessments by independent firms to ensure ongoing compliance with industry standards and regulations. These audits validate the effectiveness of GruntWorx's security measures and compliance protocols.

- **Privacy Policies:** GruntWorx has comprehensive privacy policies in place to protect client data. These policies outline how data is collected, used, and stored, ensuring transparency and accountability.

By adhering to these security and compliance measures, GruntWorx ensures that client data is handled with the utmost care and protection, providing peace of mind to tax professionals and their clients.

GruntWorx Case Studies

Our customers find using GruntWorx revolutionizes their tax preparation process to allow them to spend more time on advising their clients.

These examples illustrate how GruntWorx can significantly enhance the efficiency and accuracy of tax preparation, making it a valuable tool for tax professionals.

Case Study 1: GruntWorx in a Solo Compliance Practice

Overview

Felecia Dixson is a nationally recognized tax expert, seasoned practitioner, and software trainer with decades of experience in compliance, tax preparation, and workflow optimization. Operating a solo practice in Missouri, she serves over 100 clients, many of whom present high-value compliance and IRS representation cases. To manage the demands of her growing practice, Felecia turned to GruntWorx as a strategic solution for improving efficiency, accuracy, and document intake. By automating manual processes, she has been able to stay focused on high-value work while maintaining control over her operations.

Challenges

As a solo practitioner managing a compliance-heavy workload, Felecia Dixson faced a range of operational and strategic challenges in her tax representation practice. The high volume of clients required meticulous attention to detail and efficient processing, yet she had limited time and capacity to train staff or delegate manual data entry tasks. Her clients frequently submitted large and complex data sets—often late in the process—which added pressure to an already demanding schedule. The intricacies of tax resolution demanded her full focus, leaving little room for administrative overhead. At the same time, she sought a way to simplify document intake without compromising control over her workflow, aiming to maintain both accuracy and efficiency while expanding her capacity for IRS representation, tax planning, and business

development. Balancing these responsibilities under tight deadlines created a need for streamlined solutions that could support both quality and growth.

GruntWorx in Action

Felecia Dixson leverages GruntWorx to streamline the intake and processing of tax documents, allowing her to focus on high-value work such as IRS representation, compliance, and financial documentation. She uses Liscio and Dropbox to collect client files, which she then uploads directly into GruntWorx, creating a seamless and efficient workflow. One of the key advantages she values is the ability to manage large and complex tax files—such as those with over $1.4 million in 1099-B transactions—with ease. By delegating repetitive data entry to GruntWorx, she significantly reduces her manual workload and improves turnaround time. The platform integrates smoothly with her existing systems, and she is particularly enthusiastic about the upcoming GruntWorx integration button in Liscio, which she describes as *"highly beneficial, especially with the static pricing."* Felecia processes one client at a time to maintain organization and appreciates features such as uploading multiple files without overwriting prior data, identifying password-protected documents that require manual handling, and resubmitting late-arriving brokerage statements without disrupting the workflow. As she explains, *"Sometimes a client shows up with a brokerage statement after I've already submitted the return. I love that I can just throw it back in and GruntWorx adds it right in. That's significant."* Her adoption of GruntWorx's Return-Based Pricing model has further simplified her process by eliminating the need to separate documents for pricing, enhancing both speed and operational convenience.

Results & Benefits

- Saves hours per return by avoiding manual entry
- Focuses her expertise on audits, 433s, and IRS work
- Reduces reliance on untrained staff or short-term help
- Feels confident knowing GruntWorx *"consistently delivers reliable results"*
- Saves 65% of her data entry time
- Avoids burnout by eliminating repetitive entry
- Enables her to focus on IRS work, tax resolution, and book writing
- Confidence that her process works without needing a large team

"GruntWorx provides exceptional value.
I can focus on compliance and client needs while GruntWorx handles the basics."
— Felecia Dixson, EA, CTRC, ATA

Case Study 2: Elevating Efficiency and Work-Life Balance with GruntWorx

Tracy Cook, CPA, is the owner of a well-established accounting firm that specializes equally in individual tax returns and trust and estate (1041) filings. With over nine years of experience running her own practice and a background working at various firms, Tracy brings a wealth of expertise to her client engagements. Her firm utilizes Intuit Lacerte as its primary tax software and has adopted GruntWorx's VERIFIED suite of tools—including ORGANIZE, POPULATE, and Trade SUMMARY—to enhance efficiency, accuracy, and workflow consistency across her operations.

The Challenge

Before implementing GruntWorx, Tracy Cook's firm faced several operational challenges that are common among small to mid-sized tax practices. Her team endured long hours and seasonal burnout, largely due to the manual and time-intensive nature of document processing. The lack of standardization in how documents were handled and workpapers were organized further compounded inefficiencies, and much of the workload fell on high-billing staff, increasing costs. Tracy recalled, *"I was working 60+ hour weeks, and my CPA had never worked a tax season without constant overtime."* To address these issues, her firm integrated GruntWorx ORGANIZE and POPULATE into their workflow. This allowed them to standardize client documents into clean, bookmarked PDFs, delegate data entry to lower-cost administrative staff, and shift the CPA's focus to reviewing rather than inputting data. The firm also benefited from improved accuracy through GruntWorx's validation tools and internal checks. Tracy described the bookmarked PDFs as *"a game-changer,"* noting how they brought consistency and clarity to their workpapers. Additionally, the firm used GruntWorx Trades to manage complex Schedule D data and appreciated the ability to edit Excel outputs before importing, giving them full control over formatting and final presentation.

Workflow Best Practices

Tracy Cook's firm has developed a set of workflow best practices that enhance efficiency and maintain consistency across client engagements. The process begins with the CPA pre-screening and selecting only the necessary documents to be placed into a designated "GruntWorx" folder. Unless documents are duplicates or irrelevant, all materials are included to ensure completeness. Supplemental documents that are not compatible with POPULATE are still submitted and organized using internal lead sheets. Administrative staff play a key role by formatting Excel outputs to the firm's standards before importing the data into Lacerte. For trust and estate returns (1041s), the firm now uses GruntWorx ORGANIZE and is exploring the use of Schedule

D Excel outputs for future imports. As Tracy notes, *"Anything I can offload to lower-cost admin time is a win,"* underscoring the importance of leveraging staff effectively to streamline operations.

Results

- 1.5 hours saved per return (1 hour for CPA, 30 minutes for the owner)
- Overtime nearly eliminated
- Consistency across all workpapers
- Reduced errors and fatigue

> *"This was the first tax season where we barely worked overtime.*
> *I worked 50 hours, and my CPA only had to work three Saturdays."*
>
> — *Tracy Cook, CPA*

Case Study 3: Streamlining Tax Season with GruntWorx

Overview

Dawkins & Murray CPA PA is a full-service accounting firm in Wake Forest, NC, offering tax, accounting, and forensic services to individuals and small businesses. Partner Jean Murray shared how integrating GruntWorx into their workflow has led to measurable time savings and improved accuracy. With quicker turnaround times and ease of use, over the last 7 years, GruntWorx has become a key tool in their tax season success.

The Challenge

Before implementing GruntWorx, the firm struggled with time-consuming manual data entry, especially during peak tax season. It was difficult to keep up with volume, and slow turnaround times for return processing created a bottleneck. They began looking for a solution that could streamline the process, reduce errors, and free up time for more strategic work.

> *"At first we only used it on a couple [returns], just trying to get our feet wet."*
>
> — *Jean M Murray, CPA, CRFAC, RFI*

The Solution

Dawkins & Murray CPA PA adopted GruntWorx's ORGANIZE and POPULATE services to automate document sorting and tax form data entry. Onboarding was gradual, starting with a few returns before fully integrating the tools across their workflow. Jean Murray noted that the

improvements in turnaround time and the software's ease of use made a significant difference. GruntWorx's enhanced validation tools and continuous product updates stood out to the firm.

The Results

Using GruntWorx, the firm has seen major improvements in efficiency and reliability. What used to take up to a week can now be completed in a matter of hours—often within the same day.

> *"I was very impressed with the return time."*
>
> *— Jean M Murray, CPA, CRFAC, RFI*

GruntWorx also helped reduce the cognitive load for staff by minimizing manual data entry, which is especially critical during tax season. It allowed the team to focus on client communication and review, rather than document handling.

Jean estimates she saves 30 minutes per return using GruntWorx. Her best time-saving tip is using GruntWorx for stock sales.

3-Year Comparison

Year	# of Returns	Hours Saved	Dollars Saved
2022	344	172	$3,440.00
2023	433	216.5	$4,330.00
2024	505	252.5	$5,050.00

How to Get Started with GruntWorx

Register for a GruntWorx account at https://www.gruntworx.com/ and $40 will be automatically added to your account. Once in your account you can access our products and services.

Services

- **GruntWorx VERIFIED:** Our U.S.-based staff processes and reviews your data for accuracy, providing a fully automated solution.

- **Self-VERIFY LITE:** Your staff processes and validates the data.

Products

- **ORGANIZE:** This tool streamlines the organization of client tax documents into a standardized, bookmarked PDF, simplifying the review process and ensuring consistency across all client files.

- **POPULATE:** Utilizing patented technology, POPULATE extracts data from scanned tax documents and imports it directly into leading tax preparation software. This automation reduces manual data entry, minimizes errors, and accelerates the tax preparation process.

- **Trade DETAILS:** Designed for clients with numerous stock transactions, Trade DETAILS automates the extraction and organization of these transactions, facilitating accurate and efficient reporting on Schedule D/8949.

- **Trade SUMMARY:** This feature consolidates extensive trade data into a single summary sheet, providing a clear overview and simplifying the reporting process for both preparers and clients.

Pricing Options

- **Variable Pricing:** Variable pricing offers pay per page, per form, and per trade. Costs vary based on the number of pages, forms, and trades processed.

- **Return-Based Pricing Plan:** The GruntWorx Return-based Plan includes budget predictability with per return pricing for a specific time frame, discount benefits, premium support and staff onboarding.

Conclusion

GruntWorx is a game-changer in the tax preparation industry. By automating the organization and data entry of tax documents, it allows tax professionals to work more efficiently, accurately, and cost effectively. As the demand for streamlined and secure tax preparation services continues to grow, GruntWorx stands out as a trusted leader in tax automation technology.

GruntWorx Resources

Web Site: https://www.gruntworx.com

Webinars: https://www.bigmarker.com/communities/gruntworx/conferences

Free Demo: https://www.gruntworx.com/schedule-live-demo

Free Trial: https://web1.gruntworx.com/ufe/register

Onboarding

- **UltraTax CS:** https://www.gruntworx.com/onboard/ultratax

- **Intuit Lacerte:** https://www.gruntworx.com/onboard/lacerte

- **CCH Axcess:** https://www.gruntworx.com/onboard/axcess

- **Drake Tax:** https://www.gruntworx.com/onboard/drake

- **CCH ProSystem *fx*:** https://www.gruntworx.com/onboard/prosystem

- **Other Tax Software:** https://www.gruntworx.com/onboard/other

Social Media

- **Facebook:** https://www.facebook.com/GruntWorx

- **LinkedIn:** https://www.linkedin.com/company/gruntworx

- **Instagram:** https://www.instagram.com/gruntworx_automation

- **X:** https://x.com/gruntworx

- **YouTube:** https://www.youtube.com/@gruntworxofficial

- **Vimeo:** https://vimeo.com/gruntworx

Sales

- **Email:** sales@gruntworx.com

- **Telephone:** 877.830.6059 ext. 2