



COMPLYANT

Business Tax **Easier. Cheaper. Faster**

THE PATH TO COMPLYANT



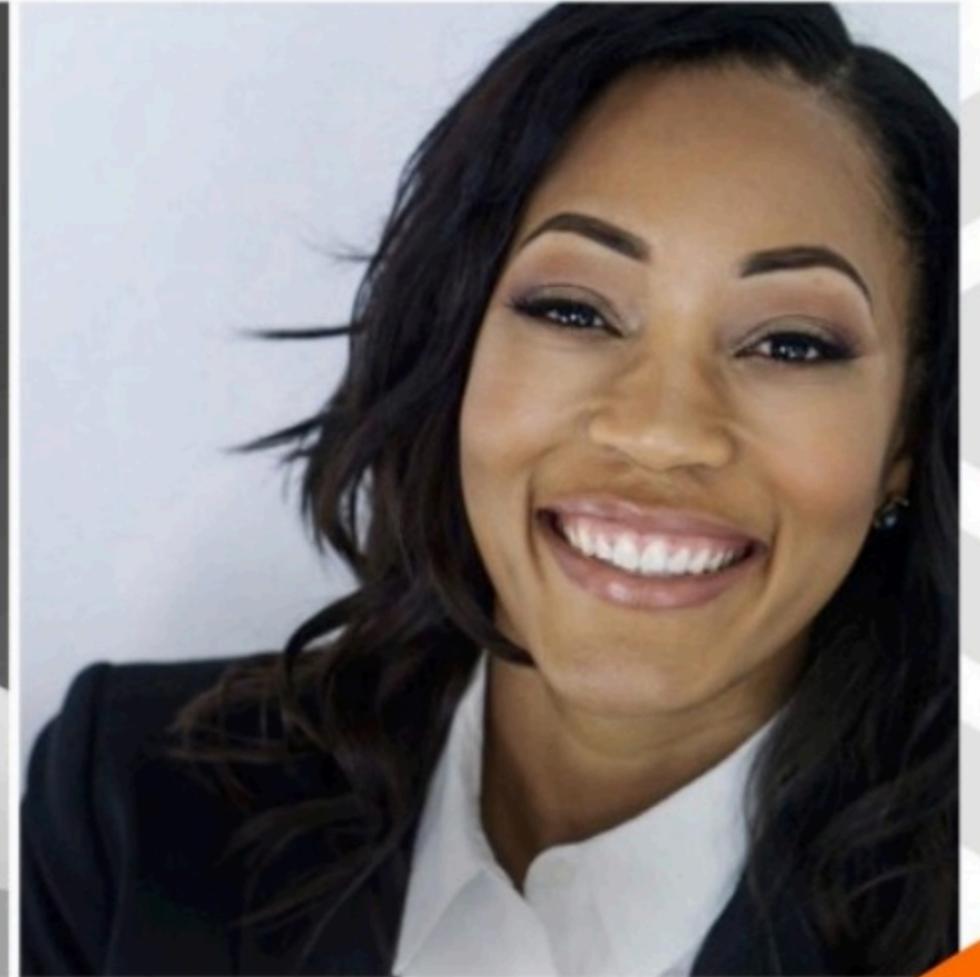
1. Tax Manager



2. Tax Supervisor



3. Accounting Compliance



4. Tax Firm

Saw over 300 clients in 3 years
Grew business to 250k Annualized Revenue

THE PROBLEM

What I learned



Business tax steps for an LLC in California requires:

1. Income tax to the IRS
2. Income tax to the state of CA
3. Annual Reports to the Secretary of State
4. Sales Tax to the Department of Revenue
5. Business Property Tax to the county, if the business has assets
6. Business license renewal to the city

Who's Tracking Renewals across city, county, state & federal obligations?

No One

\$60B+

Tax Penalties

THE SOLUTION

A digital assistant



Reminders

Reminders to file all tax forms on time.



Wallet

Savings wallet to help segregate tax portion of income.



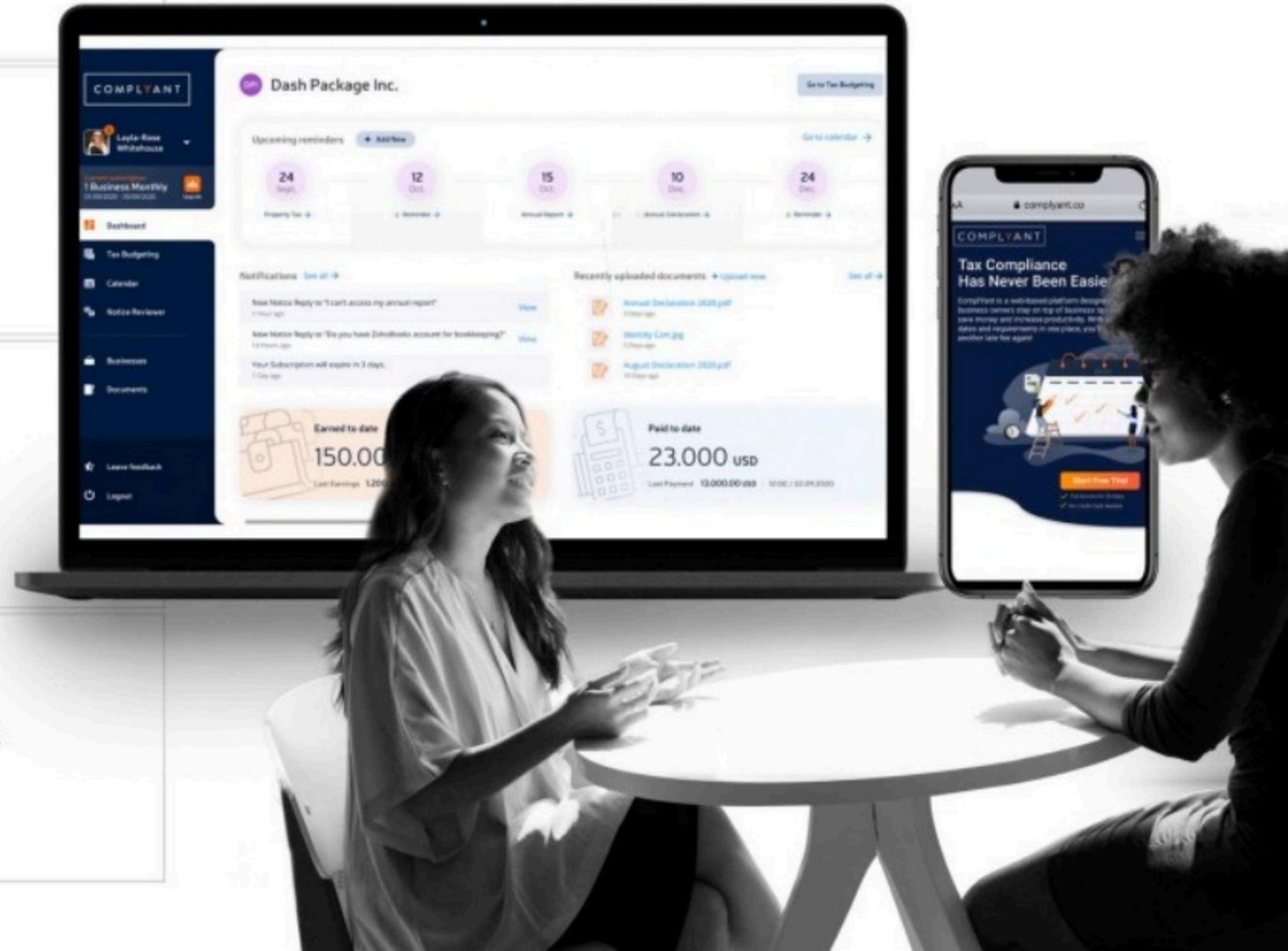
Filing & Payment Tool

Compiles accurate information for filing all tax returns (sales, income, property etc.)



Accountant Access:

Allows tax professionals to access client accounts for co-management.



Market

1

32.5m small
businesses

+

57.3m freelancers

+

627,000 new businesses
created each year

yes there are steps for this too

2

= 90.4m business taxpayers * \$600 average
price per year * 15% market share capture

ComplyYant is tackling an \$8.1B gap in the market.

3

TAX MARKET

77 M

People

Prepare their own tax returns.

\$11 B

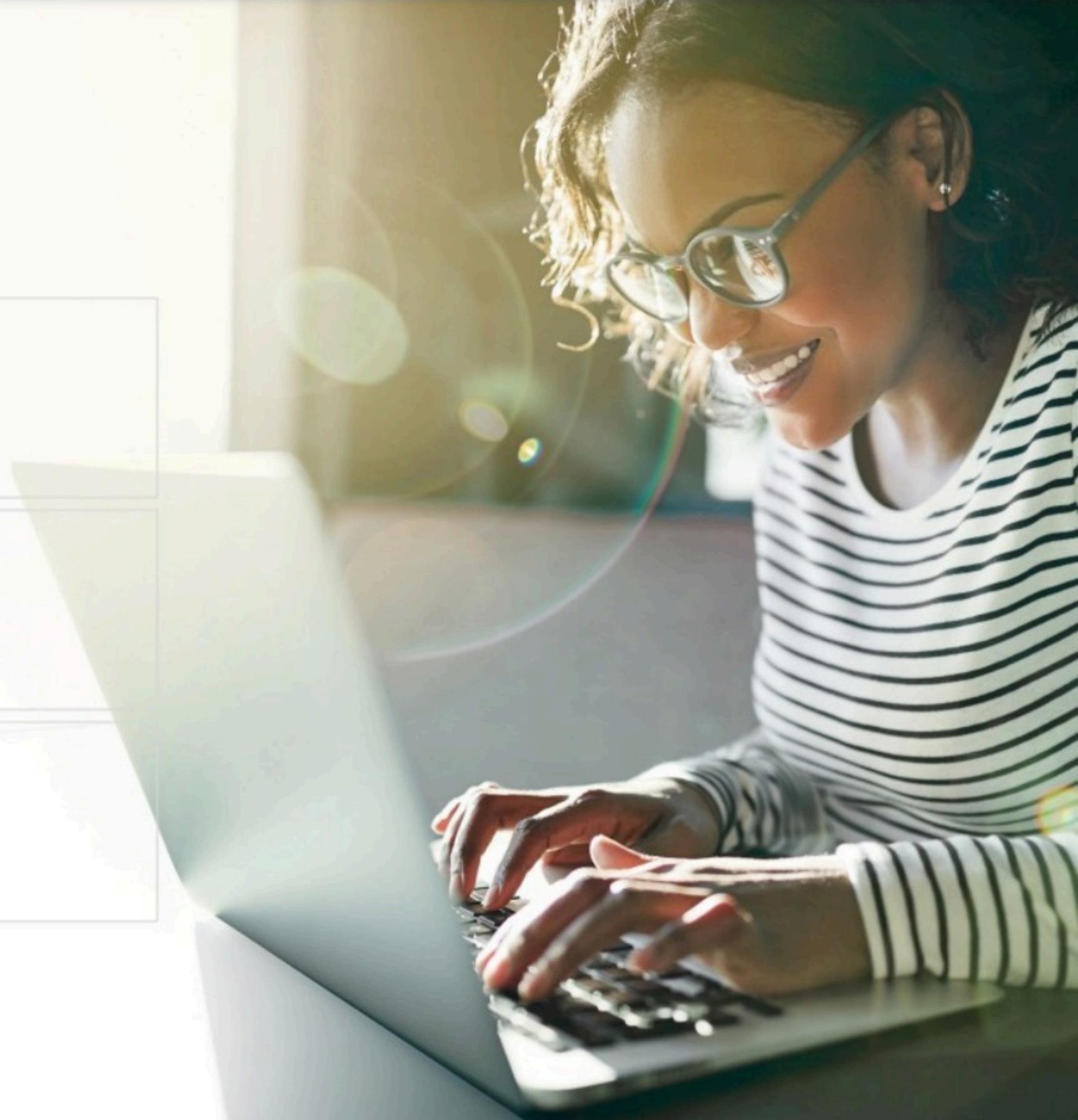
Tax Software Market

Total revenue size of tax software offering and growing 5% per year.

\$60 B

Penalties

Paid each year for late filed returns.



VISION

Our vision is to be the leader in business tax



1



Tax payment processing

2



Accountant to client CRM

3



Improved Education

4



Banking as a service to better bookkeeping

COMPETITION

| | | <i>Payroll Tax</i> | <i>Bookkeeping</i> | <i>Sales Tax</i> | <i>Sales Tax</i> | <i>Income Tax</i> |
|---|-----------------|--------------------|--------------------|------------------|------------------|-------------------|
| | ComplYan | Quickboo | Xero | Tax Jar | Avalara | Turbotax |
| Tax Deadline Tracking for all tax types | ✓ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Tax Savings Wallet | ✓ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Sales Tax Payment Processing | ✓ | ✓ | ✗ | ✓ | ✓ | ✗ |
| Business Property Tax Tools | ✓ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Business License Management | ✓ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Annual Report Management | ✓ | ✗ | ✗ | ✗ | ✗ | ✗ |

TEAM



Shiloh Johnson, CPA,
MST
Founder



Lee Hamilton
Engineer
(Microsoft)



Rick Bromund
Prop Tax (Heinz)



Francine Gaither
Corp Tax (AH4R)



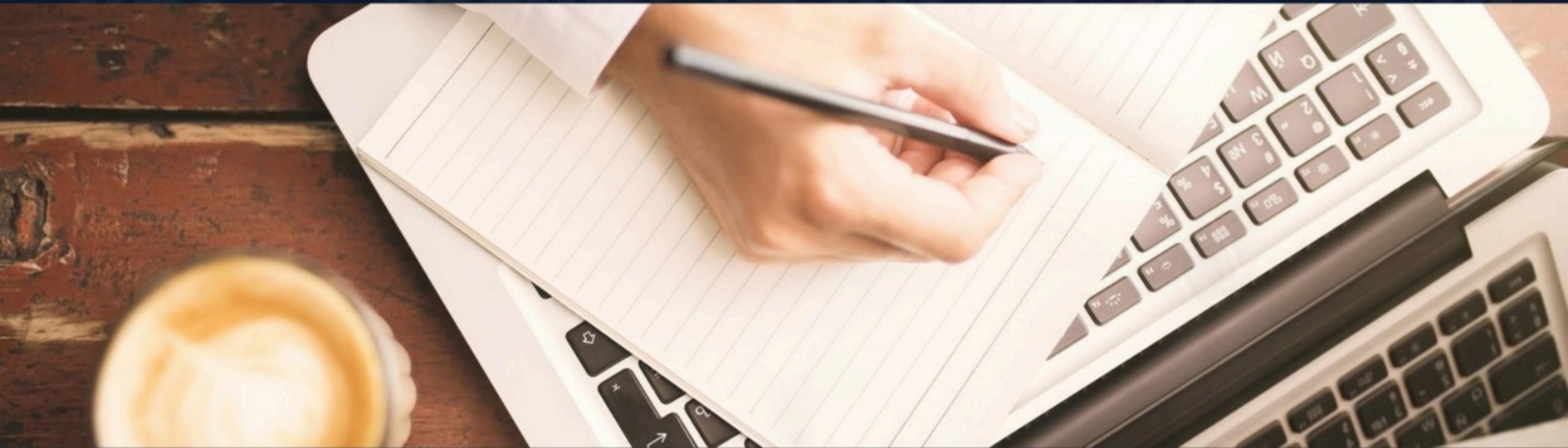
Aerin Paulo
B2B Marketing



MARKET STRATEGY

Cold outreach testing workable channels:

| | |
|----------------------------------|-----------|
| Secretary of State data access – | CAC \$35 |
| Small Business Events – | CAC \$15 |
| Google Ad/SEO optimization – | CAC \$78 |
| Hosted Tax Workshops – | CAC \$17 |
| Accountant Affiliate Program- | CAC \$100 |



MILESTONES/ ACCOLADES



Closed a pre-seed raise from Mucker and Slauson & Co



Grew team to 9 FTEs



Received a \$25k grant from Pledge LA and Annenberg Foundation



Backed by Techstars '21



Acquired four partnerships



Acquired our 1200th paid subscriber





USE OF FUNDS

- ✓ Engineering
- ✓ Customer Service
- ✓ Tax Research
- ✓ Marketing spend
- ✓ Employee Benefits
- ✓ Increased software stack
- ✓ Equipment



Contact Information

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COMPLYANT



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