

# Taxfyle

Your taxes made simple

## Overview

Sector: Fintech

HQ: Miami, FL

About: Founded in 2015, Taxfyle provides an accounting based application to connect businesses and individuals with CPAs who help file tax returns

Sourced: Strong relationship with our general and managing partners

Website: taxfyle.com

## Leadership



Richard Lavina, CPA  
Co-founder & CEO  
PwC (Auditor)



Michael Mouriz  
Co-founder & COO  
Licensed Attorney

## Investment Highlights

- Disrupting traditional tax and accounting services by creating a secure, on-demand tax and accounting marketplace
- Management team with deep domain knowledge and extensive network within tax/ accounting industry
- \$22B Total Addressable Market due to a multi-platform business model (B2C & B2B)
- Leveraging exponential factors of Algorithm, Leveraged Assets, and Staff On Demand
- B2C: The Taxfyle app was ranked by Apple as the #1 Tax-Time app 3 years in a row
- B2B partnerships: PwC, RSM, Praxity, Fiducial, KSDT, MBO, and Kaufman Rossin
- KPIs and financial numbers show strength, profitability and scalability
- Ability to white label the technology in other vertical markets: Law, CFPs, and Human Resources

## Financing History

• **\$900k** Early Stage VC Round

*(June & Dec. 2017)*

Rokk3r Fuel ExO (Lead)

• **\$2MM** Seed *(Feb. 2017)*

Venture Partners LLC

• **\$1.8MM** Angel Investment

*Raised from 3 different rounds in Jan. 2016, Apr. 2016, and Jan. 2017*

