

April Tax Solutions

A Provider of Tax Technology to
Financial Institutions, Wealth
Management Firms, & Retail
Clients

Tiburon Written Research
November 17, 2025



TIBURON STRATEGIC ADVISORS

Industry Leading Think Tank, Advisor, and Investor in
Wealth & Investment Management (& WealthTech) Firms

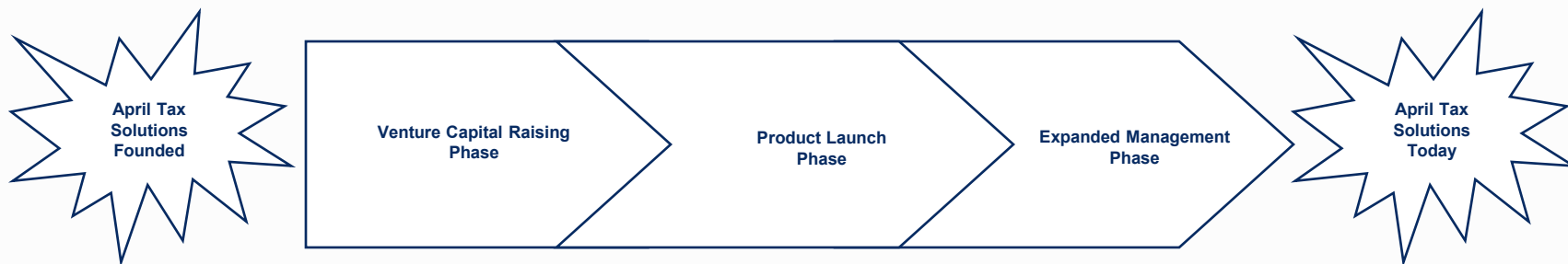


Comments

- **Founded in 2021**
 - **Founded by Ben Borodach & Daniel Marcous**
- **Based in New York, NY**
- **2 offices**
- **76 employees**
- **50 institutional partners**
- **CEO: Ben Borodach**
 - **President: Raj Doshi**
- **Privately owned**
- **Website: www.getapril.com**

April Tax Solutions was Founded in 2021 and Has Subsequently Evolved through its Venture Capital Raising, Product Launch, & Expanded Management Phases

April Tax Solutions History



Approximate Dates:	2021	2021 - 2222	2023	2024 - 2026	2026
Key Steps:	<ul style="list-style-type: none"> 2021: April Tax Solutions founded 	<ul style="list-style-type: none"> 2022: Raised \$10.0 million venture capital 2022: Raised \$30.0 million venture capital 2022: Accredited A+ by Better Business Bureau (BBB) 	<ul style="list-style-type: none"> XXXX: -- 	<ul style="list-style-type: none"> 2024: Raj Doshi joined 2025: Raised \$38.0 million venture capital 	



Source: 11/13/25 Google Website; 11/12/25 Crunchbase Website; 10/29/25 April Tax Solutions Presentation (Doshi); 7/23/25 Accounting Today Website; 3/27/25 April Tax Solutions Website; 3/27/25 LinkedIn Website; 3/27/25 Google Website; 3/27/25 State of New York Website; 6/30/22 April Tax Solutions Press Release; 1/20/22 Venture Capital Journal Website; Tiburon Research & Analysis

April Tax Solutions was Founded by Ben Borodach & Daniel Marcous in 2021




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Source: 11/13/25 Google Website; 10/29/25 April Tax Solutions Presentation (Doshi); 3/27/25 April Tax Solutions Website; 3/27/25 LinkedIn Website; 3/27/25 State of New York Website; Tiburon Research & Analysis

April Tax Solutions Has Had Numerous Venture Capital Raises, Including its Seed Round in 2022



April Tax Solutions Venture Capital Raises

Seed Round	Series A	Series B	--
<ul style="list-style-type: none"> • Raised in 2022 • Raised \$10.0 million • Investors: <ul style="list-style-type: none"> – Euclidean Capital – iAngels – NYCA Partners – QED Investors – Team8 – Treasury Partners 	<ul style="list-style-type: none"> • Raised in 2022 • Raised \$30.0 million • Investors: <ul style="list-style-type: none"> – Atento Capital – NYCA Partners – QED Investors – Team8 – Treasury Partners 	<ul style="list-style-type: none"> • Raised in 2025 • Raised \$38.0 million • Investors: <ul style="list-style-type: none"> – Euclidean Capital – iAngels – Industry Ventures – NYCA Partners – QED Investors – Team8 – Transpose Platform Management – Treasury Partners 	<ul style="list-style-type: none"> • -- <div data-bbox="1522 1116 1754 1225" style="text-align: right;">  </div>

Source: 11/12/25 Crunchbase Website; 10/29/25 April Tax Solutions Presentation (Doshi); 8/7/25 Crunchbase Website; 7/23/25 Accounting Today Website; 3/27/25 Google Website; 6/30/22 April Tax Solutions Press Release; 1/20/22 Venture Capital Journal Website; Tiburon Research & Analysis

April Tax Solutions Has Won Many Awards, Including Being Accredited A+ by the Better Business Bureau (BBB) in 2022

April Tax Solutions Awards & Recognition

<p>Better Business Bureau (BBB)</p>	<p>--</p>	<p>--</p>	<p>--</p>
<ul style="list-style-type: none"> • 2022: A+ Better Business Bureau (BBB) accreditation 	<ul style="list-style-type: none"> • -- 	<ul style="list-style-type: none"> • -- 	 

April Tax Solutions Has a Tagline Emphasizing Tax Solutions as a Key Component of Clients' Financial Experiences

April Tax Solutions Tagline

“Taxes are not just another feature – they are the key to delivering a complete & connected financial experience”

The logo for April, featuring the word "april" in a bold, lowercase, purple sans-serif font, set against a light gray rectangular background.

April Tax Solutions Has Another Tagline Highlighting its Services for the Wealth Management Industry

April Tax Solutions Tagline

**“The all-in-one income tax suite enabling
the wealth industry to increase client
lifetime value”**

The logo for April Tax Solutions, featuring the word "april" in a bold, lowercase, blue sans-serif font. The text is set against a light gray rectangular background.

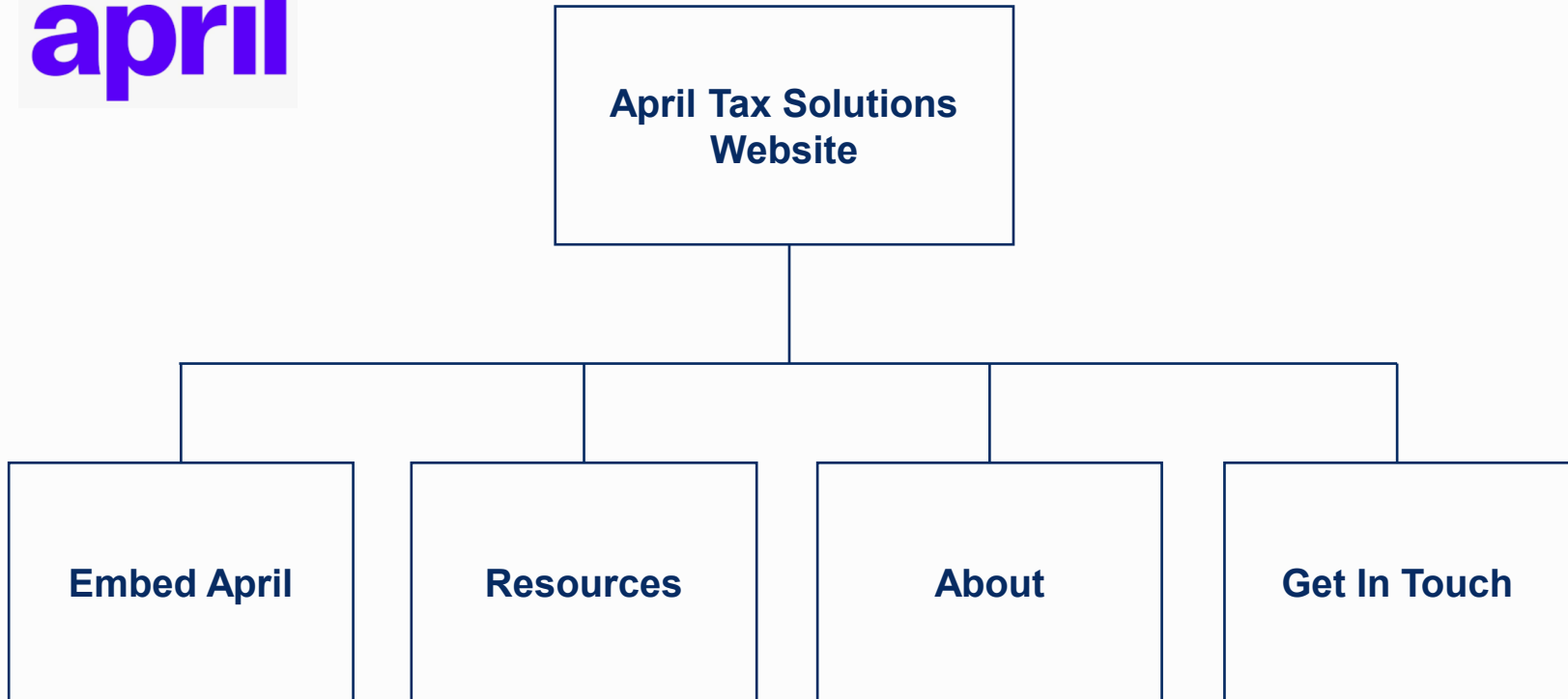
April Tax Solutions Mission

**“Integrate a suite of filing & planning tools
to make tax a built-in advantage for your
clients”**

The logo for April Tax Solutions, featuring the word "april" in a bold, lowercase, purple sans-serif font. The text is set against a light gray rectangular background.

April Tax Solutions Has a Website with Four Core Sections, Including Embed April, Resources, About, & Get In Touch

April Tax Solutions Website

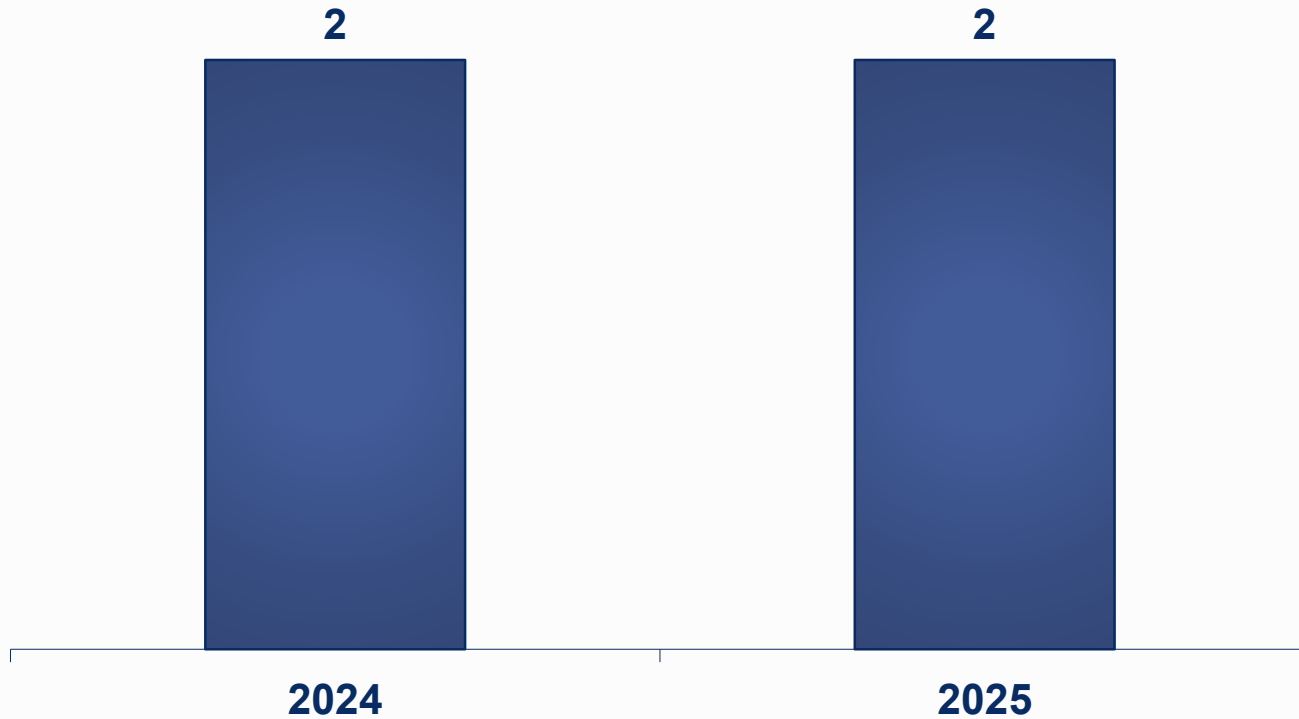
The logo for April Tax Solutions, featuring the word "april" in a bold, lowercase, purple sans-serif font.

Source: 11/17/25 April Tax Solutions Website; 11/14/25 April Tax Solutions Website; 11/13/25 April Tax Solutions Website; 11/12/25 April Tax Solutions Website; 3/27/25 April Tax Solutions Website; Tiburon Research & Analysis

April Tax Solutions Has Two Offices, Consistent Since 2024



April Tax Solutions Offices



Source: 11/12/25 LinkedIn Website; 3/27/25 April Tax Solutions Website; 3/27/25 LinkedIn Website; Tiburon Research & Analysis

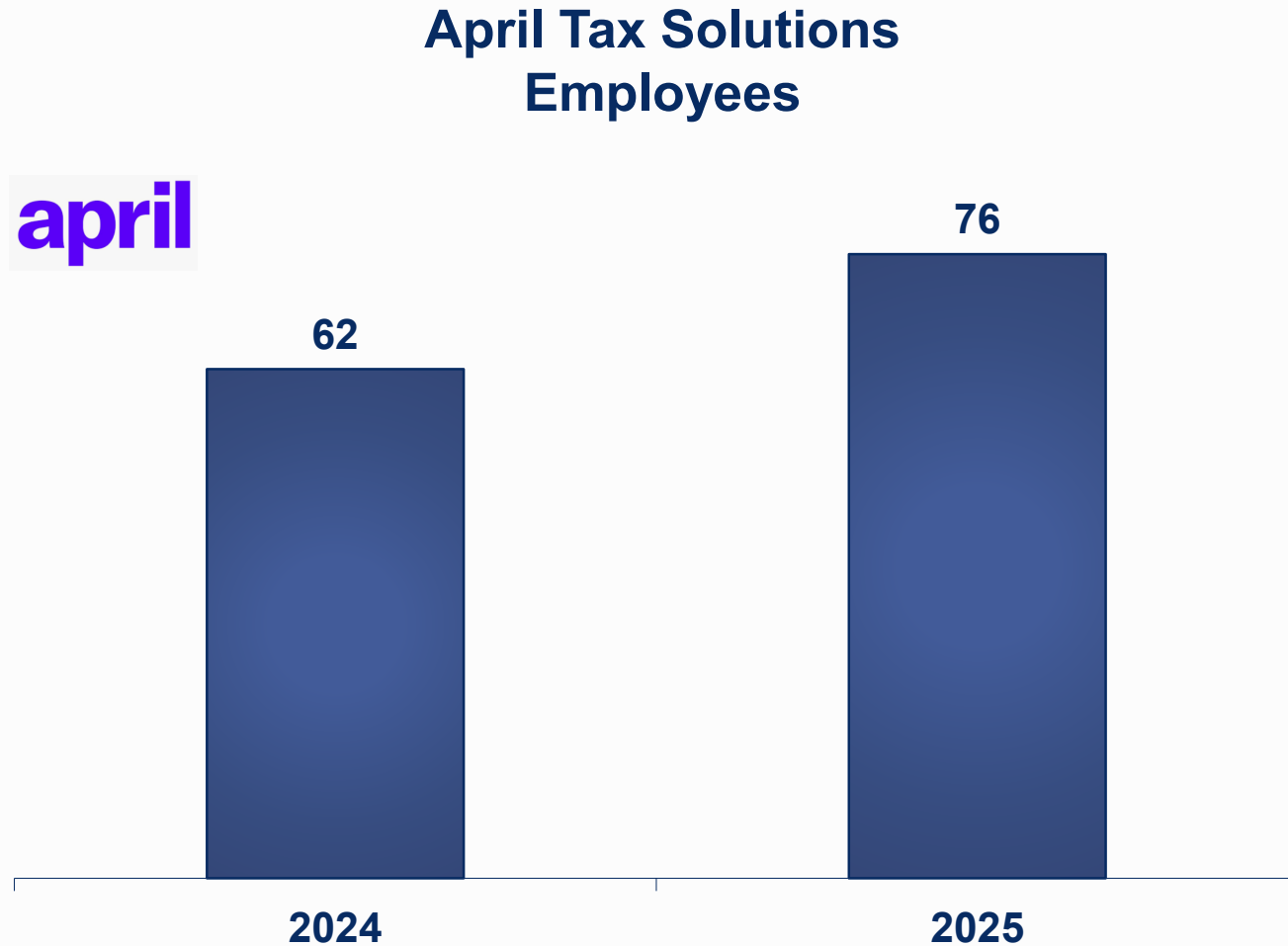
April Tax Solutions' Offices Include New York, NY, & Tel Aviv-Yafo, Israel

April Tax Solutions Offices

- **New York, NY**
- **Tel Aviv-Yafo, Israel**
- **--**



April Tax Solutions Has 76 Employees, Up From 62 in 2024

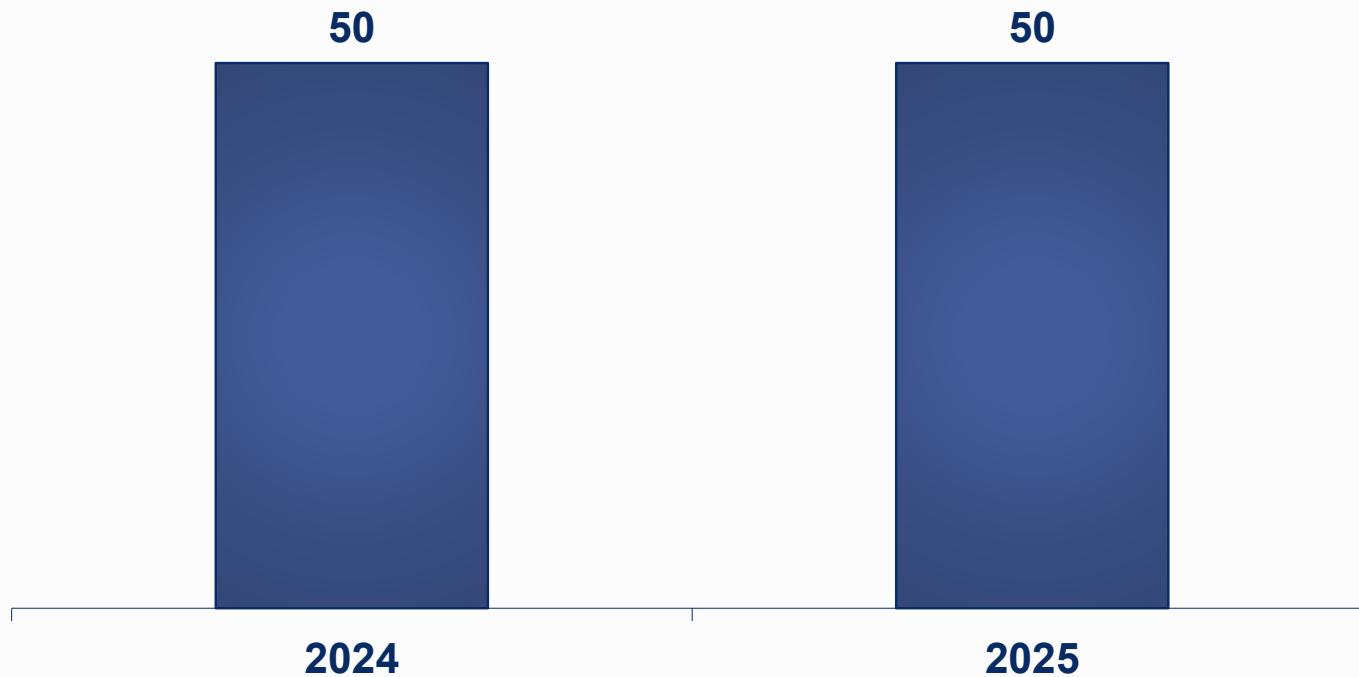


Source: 11/12/25 LinkedIn Website; 3/27/25 April Tax Solutions Website; 3/27/25 LinkedIn Website; Tiburon Research & Analysis

April Tax Solutions Serves 50 Institutional Partners, Consistent Since 2024

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April Tax Solutions Institutional Partners



Source: 7/23/25 Accounting Today Website; Tiburon Research & Analysis

April Tax Solutions' Institutional Partners Include Ameriprise Financial Services, Facet Wealth (DBA Facet), & Nasdaq Private Market

April Tax Solutions Institutional Partners

- **Ameriprise Financial Services**
- **Facet Wealth (DBA Facet)**
- **Gusto**
- **NASDAQ**
 - **Nasdaq Private Market**

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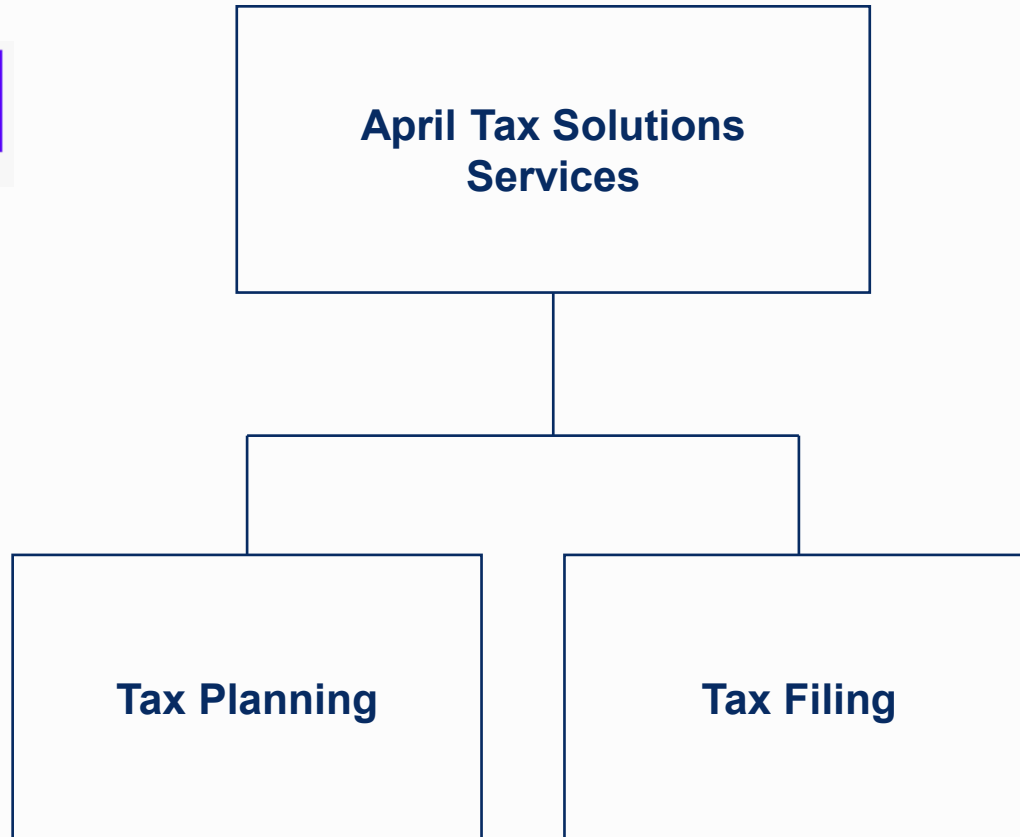
Ameriprise  **Facet.**
Financial

Source: 11/17/25 Google Website; 10/29/25 April Tax Solutions Presentation (Doshi); 3/27/25 Google Website; 3/17/25 Google Website; Tiburon Research & Analysis

April Tax Solutions Provides a Number of Services, Including Tax Planning & Tax Filing

April Tax Solutions Services

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Source: 11/14/25 April Tax Solutions Website; 10/29/25 April Tax Solutions Presentation (Doshi); 3/27/25 Google Website; 3/27/25 April Tax Solutions Website; Tiburon Research & Analysis

April Tax Solutions' First Service is Tax Planning

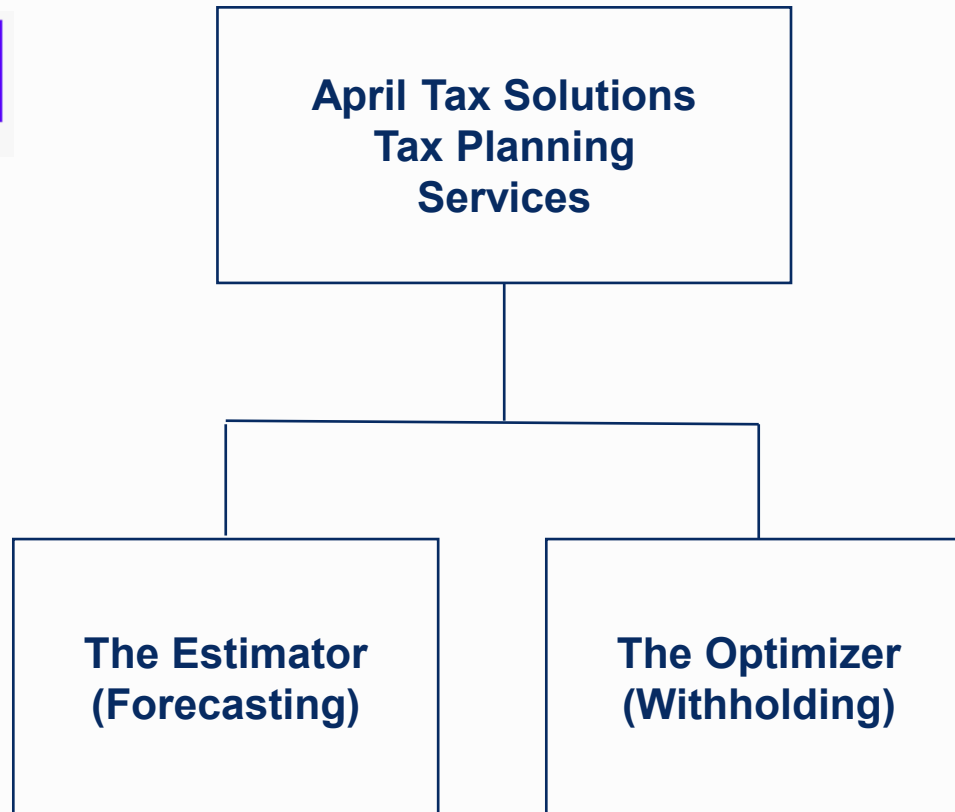
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Comments

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April Tax Solutions Provides a Number of Tax Planning Services, Including The Estimator (Forecasting) & The Optimizer (Withholding)

**April Tax Solutions
Tax Planning
Services**



April Tax Solutions' Tax Planning's First Service is The Estimator (Forecasting)

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Comments
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April Tax Solutions' Tax Planning's Second Service is The Optimizer (Withholding)

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Comments

- --

April Tax Solutions' Second Service is Tax Filing

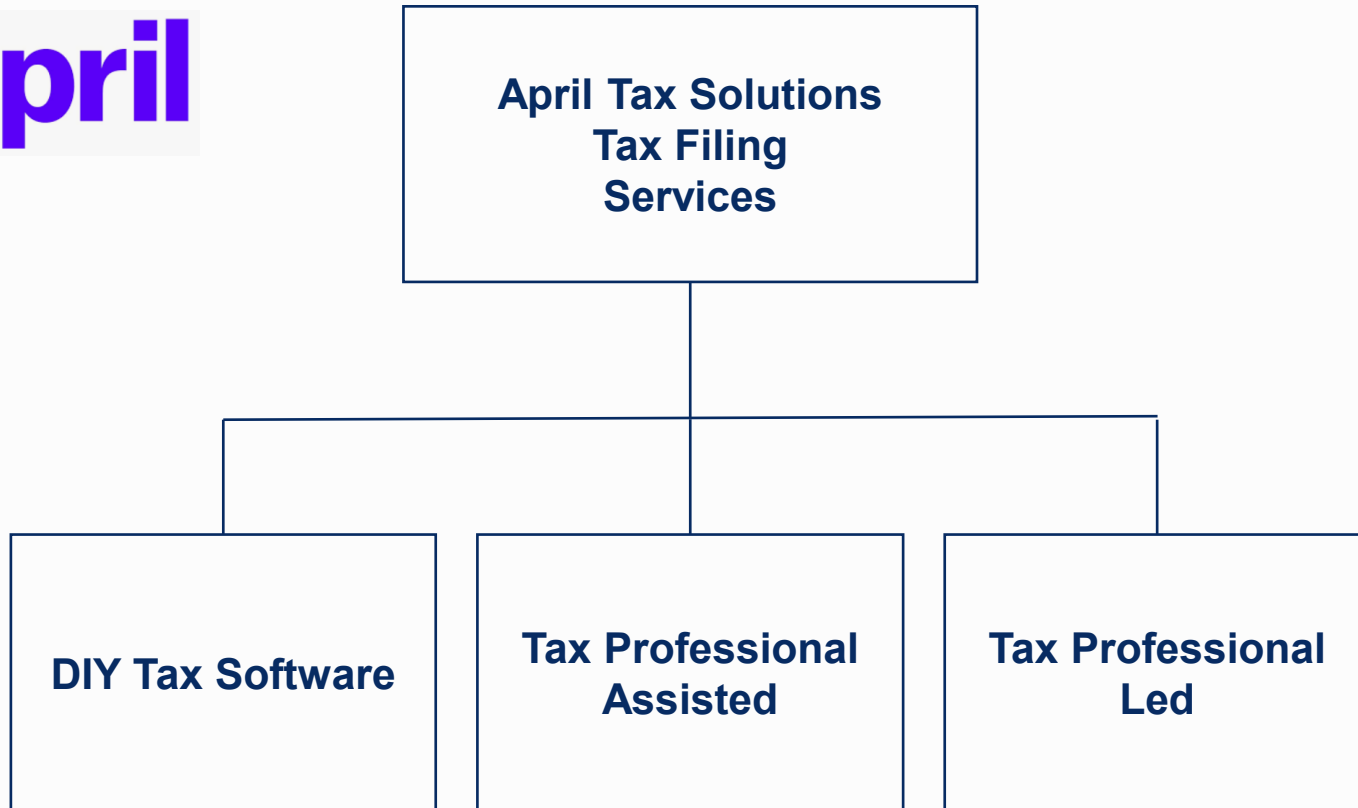
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Comments

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April Tax Solutions Provides a Number of Tax Filing Services, Including DIY Tax Software, Tax Professional Assisted, & Tax Professional Led

April Tax Solutions Tax Filing Services



April Tax Solutions' First Tax Filing Service is DIY Tax Software

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Comments

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April Tax Solutions' Second Tax Filing Service is Tax Professional Assisted

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Comments

- --

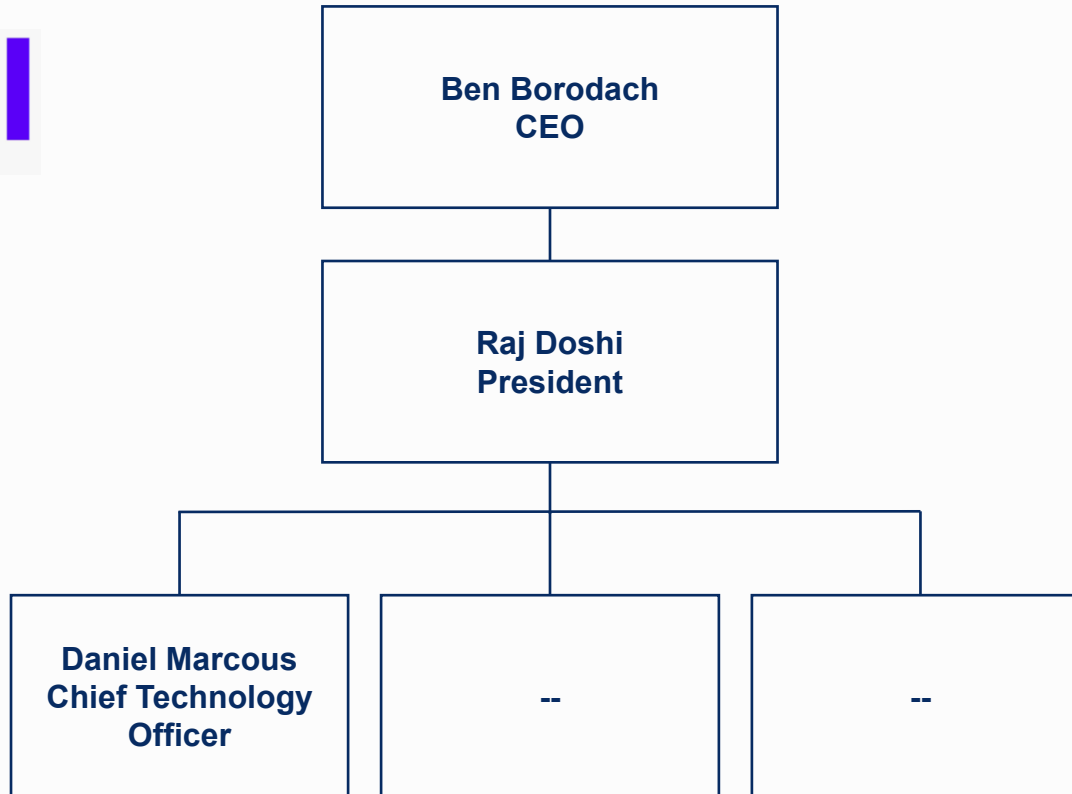
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Comments
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April Tax Solutions is Led by its CEO Ben Borodach & President Raj Doshi

April Tax Solutions Organizational Chart



Note: Ben Borodach co-founded the firm in 2021; he was formerly at Deloitte & Team8; Raj Doshi joined the firm in 2024; he was formerly at Avantax, Google, McKinsey & Company, and Updater; Daniel Marcous co-founded the firm in 2021; he was formerly at Google

Source: 11/12/25 April Tax Solutions Website; 3/27/25 Google Website; 3/27/25 April Tax Solutions Website; 3/27/25 LinkedIn Website; Tiburon Research & Analysis

April Tax Solutions Has a Board of Directors that Includes Ben Borodach, Lowell Putnam, & Rakefet Russak-Aminoach

April Tax Solutions Board of Directors

<p>-- (Chairman)</p>	<p>Ben Borodach</p>	<p>Lowell Putnam</p>	<p>Rakefet Russak-Aminoach</p>	<p>--</p>
<ul style="list-style-type: none"> • -- 	<ul style="list-style-type: none"> • CEO, April Tax Solutions • Joined board in 2021 	<ul style="list-style-type: none"> • CEO, Usual Things (DBA Supper) • Joined board in 2022 	<ul style="list-style-type: none"> • Managing Partner, Team8 • Joined board in 2021 	<ul style="list-style-type: none"> • -- 

Source: 11/13/25 LinkedIn Website; Tiburon Research & Analysis

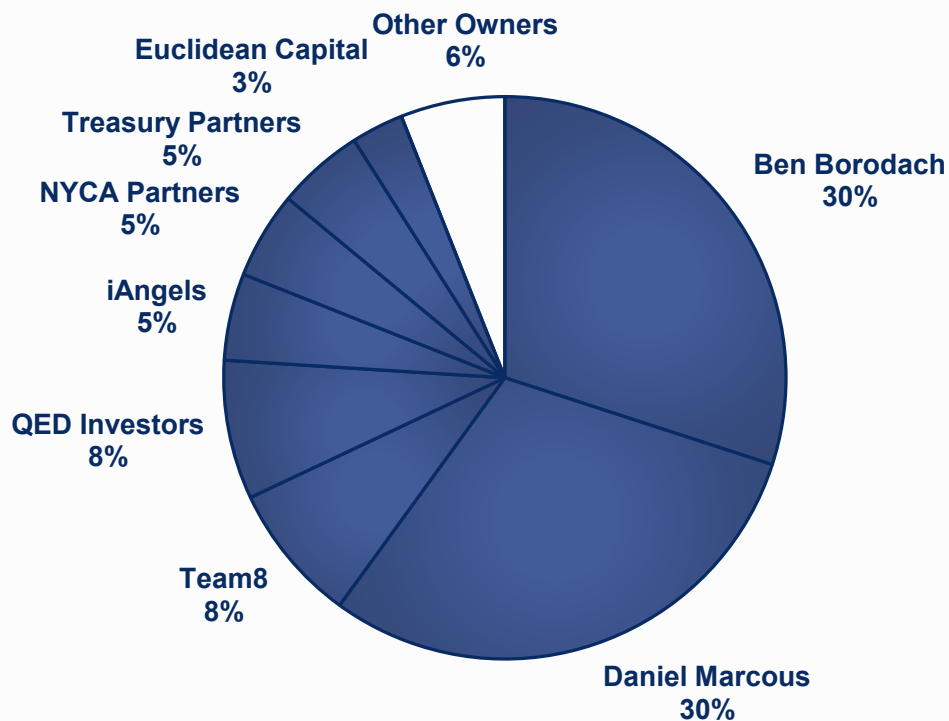
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Comments

- --

April Tax Solutions is Owned by Ben Borodach, Daniel Marcous, Team8, QED Investors, & Other Owners

April Tax Solutions Ownership By Owner



Source: 11/12/25 Crunchbase Website; 10/29/25 April Tax Solutions Presentation (Doshi); 8/7/25 Crunchbase Website; 7/23/25 Accounting Today Website; 3/27/25 April Tax Solutions Website; 3/27/25 LinkedIn Website; 3/27/25 Google Website; 6/30/22 April Tax Solutions Press Release; 1/20/22 Venture Capital Journal Website; Tiburon Research & Analysis



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