

# Charles Rettig Joins upSWOT as a Shareholder and a Senior Advisor

CHARLOTTE, NC, USA, February 22, 2024 /EINPresswire.com/ -- upSWOT, a leading provider of innovative financial solutions, proudly announces the addition of Charles Rettig, former IRS commissioner and leader, as a valued shareholder and senior advisor.

In his role as Commissioner, Mr. Rettig presided over the nation's tax system, overseeing an agency of more than 80,000 employees and an annual budget exceeding \$13.4 billion. The IRS played a vital role, contributing to more than 95% of the gross revenue of the country, surpassing \$4.9 trillion in FY22. The success of the United States in delivering essential services and benefits—ranging from infrastructure and education to Economic Impact Payments, Child Tax Credits, and safeguarding our freedom—depended, in part, on the accomplishments of the IRS during Mr. Rettig's tenure.



Mr. Rettig's unparalleled expertise and extensive network are poised to play a pivotal role in advancing upSWOT's product development and accelerating the company's overall growth.

Charles Rettig's decision to join upSWOT stems from his admiration for the company's product, leadership, and the entire team, recognizing their remarkable achievements, vision and culture. In a statement, Mr. Rettig expressed, "It is an honor to join the incredible leadership team at upSwot. Real people developing innovative technology and cutting edge solutions significantly benefiting small and mid-sized businesses and others around the world. Financial decisions are based on financial data that is sometimes delayed or perhaps difficult to comprehend. upSwot bridges that knowledge gap allowing for important, real time decision making."

As part of his role at upSWOT, Charles Rettig will actively contribute to the development of new

products tailored to assist Small and Medium-sized Businesses (SMBs) with their tax needs. These cutting-edge solutions are set to usher in a new era of digital banking tools, providing businesses with the resources they need to navigate the complexities of taxation efficiently directly through their banks and credit unions.

upSWOT's mission is centered around bringing revolutionary technology to millions of businesses, partnering with banks, credit unions, fintechs, telcos, insurance companies and more. Charles Rettig believes that this strategic approach will guide and educate entrepreneurs, empowering them to make informed financial decisions and ultimately contribute to the overall economic growth of the nation.

## About upSWOT

upSWOT is an "embedded Mint for businesses and consumers" designed to enhance online/mobile banking with actionable insights, cash flow forecasts, cash management, credit score boost and other features powered by 100+ API-enabled apps. The outcome of using the tech drives a better stickiness, more deposits and accurate underwriting.

upSWOT is used by over 200 Banks and FIs like Mastercard, Nerdwallet, OnDeck, FSNB, Republic Bank, LCF, Alkami, and hundreds of others that bring 12 embedded widgets into their digital experience. Among them are:

- Credit Boost: Improves business credit scores, making lending easier.
- Tax Management: Simplifies tax filings and compliance.
- Valuation: Provides insights for strategic decision-making to grow the valuation of the company.
- Carbon Footprint: Calculates CO2e and promotes eco-friendly spending.
- Cash Flow Forecast: Projects cash flow with scenario modeling.
- Marketing: Evaluates platform effectiveness and key metrics.
- Insights: Offers data-driven actions to improve operations.
- Performance Metrics: Provides real-time KPIs from connected apps.
- Payment Calendar: Organizes invoices and bills for timely payments.
- Multi-Company: Aggregates statistics for multiple entities.

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