

# Streamlining Income Tax Planning and Compliance Services with SmartVault

DAC Advisory Services | Redondo Beach, California

As a CPA and tax consultant, Drisa Carrizo, the owner for DAC Advisory Services, serves over 300 small business and individual clients across diverse industries. She leverages SmartVault – a cloud-based document management and client portal platform – to enable secure and efficient document and tax workflows.

## Seeking a Modern Solution For Her Practice

Drisa relied on CCH Axcess™ workflow and document management systems at a prior firm. She decided to explore modern solutions when she launched her own practice.

“I was with SmartVault from day one,” she said.

Now fully embedded in her workflow, SmartVault delivers quantifiable time and cost savings while also providing confidence that sensitive information is protected with bank-level security. SmartVault allows her to quickly request documents and eSignatures from clients. “It gives me maximum efficiency in communicating with clients and organizing sensitive information,” explained Drisa.

And the client portal makes it easy for her clients to upload, review, and sign documents – 100% online and from wherever they’re located.

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Drisa Carrizo, CPA

## Running Her Practice with Confidence and Efficiency

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Given her fully digital processes and enthusiastic client feedback, Drisa genuinely recommends SmartVault to other firms seeking security, collaboration, and productivity gains. “It’s the best tool I have found to organize, share, and send information seamlessly,” she concluded.

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