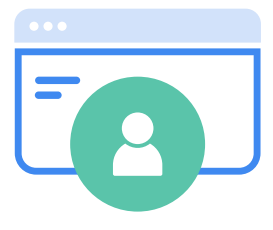


# Tax Prep Automation Workflow

Less paperwork, more of what matters  
— your clients, your business, your life.



## Engage – Automate Client Onboarding & Engagement

Turn prospects into clients faster with streamlined pricing, engagement letters, and eSignatures.

- Client outreach
- Engagement letter signing
- Proposal & pricing estimates
- Client intake & information capture
- Bulk engagement letters & client record creation
- Secure portal for document submissions



### Why It Matters

Saves time, reduces errors, and eliminates manual follow-ups during client intake



## Collect – Simplify Document Requests & Tracking

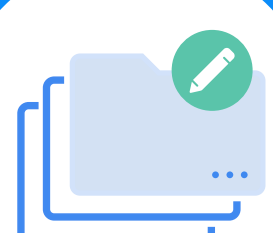
Eliminate document chaos with a secure portal, automated requests, and structured intake.

- Client uploads & document tracking
- Bulk document requests
- Reduced manual follow-ups for missing files
- Structured digital intake forms for tax data collection
- Mobile-friendly document scanning & automatic PDF conversion



### Why It Matters

Reduces back-and-forth emails, organizes client submissions, and speeds up tax prep



## Prep & Review – Automate Workpaper Organization & Tax Prep

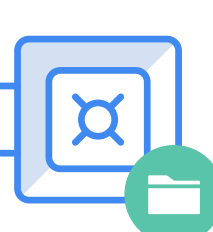
Centralize, organize, and integrate with tax software for a seamless preparation process.

- Sync tax documents directly with ProConnect, Lacerte, ProSeries, UltraTax CS, and Drake
- Secure document storage with version control
- Automated workpaper filing & review workflows
- Team collaboration with role-based access
- Convert scanned tax documents into digital files instantly



### Why It Matters

Seamlessly integrates with tax software, automates document handling, and eliminates paper clutter



## Deliver – Secure Tax Return Delivery & Payments

Deliver returns securely with automated eSignatures, client access, and built-in controls.

- Form 8879 & document signing with KBA identity verification
- Secure client access to completed returns
- Digital tax return delivery — eliminating email risks
- Organized return distribution — documents remain restricted until payment is received



### Why It Matters

Provides faster, more secure, and professional tax return delivery process, ensures compliance with IRS identity verification requirements, and protects sensitive financial data



## Archive – Stay Audit-Ready & Compliant

Secure long-term storage with built-in compliance, version control, and audit tracking.

- Retain tax documents securely for required retention periods
- SOC 2 Type 2 certified for rigorous data protection
- IRS 4557 & FTC Safeguards Rule compliance for tax firms
- Advanced search & retrieval for archived documents
- Audit logs & role-based access permissions



### Why It Matters

Keeps firms audit-ready, protects sensitive client data, and maintains compliance effortlessly — reducing risk and ensuring regulatory adherence

Ready to streamline your tax prep workflow?  
**Schedule a demo with SmartVault today**

[Book a Demo](#)