SmartVault

Document Management: The Core of Your Accounting Practice

Your document management system isn't just another storage solution. When positioned at the core of your tech stack, it drives efficiency, growth, and security across your firm.

Increase Productivity
Reduce document handling time by up to 75% with automated routing and 24/7 remote access. Keep projects moving forward whenever and wherever you, your team, and clients are working.

Protect Data
SOC 2 Type 2 certified platform featuring bank-grade encryption, granular access controls, file locking, and comprehensive audit trails that keep your clients' sensitive information secure.

Simplify Compliance
Meet regulatory requirements with built-in support for IRS 4557, FTC Safeguards, GLBA, FINRA, SEC, and other standards. Maintain detailed audit trails of all document activity for complete peace of mind.

"We doubled our client base because of SmartVault."
Nick Boscia, CPA, EA

Read the story

Reduce Costs
Cut operational costs by eliminating paper storage, reducing manual entry up to 90%, and enabling staff to focus on revenue-generating tasks instead of administrative work.

Scale Your Firm
Scale operations seamlessly with unlimited storage, guest users, and automated workflows that grow with you. Retain top talent by providing modern tools that improve work-life balance.

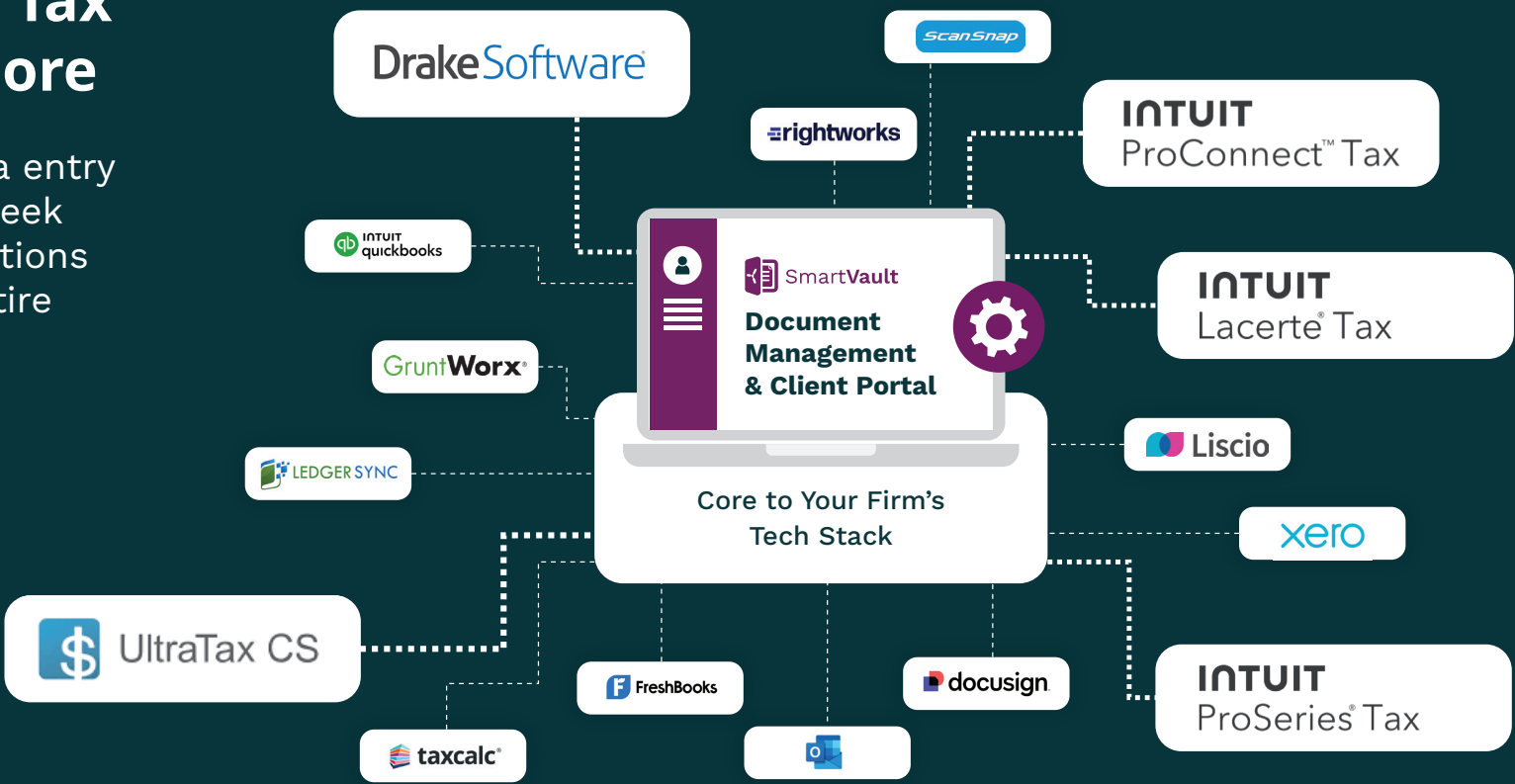"SmartVault has saved our firm $150,000 per year through improved document workflows."
Eric L. Green, Esq.

Read how

Connect Your Tax Prep App & More

Eliminate double data entry and save hours per week with powerful integrations that connect your entire tech stack.

Learn More

DrakeSoftware
ScanSnap
rightworks
INTUIT ProConnect™ Tax
INTUIT quickbooks
SmartVault
Document Management & Client Portal
INTUIT Lacerte Tax
GruntWorx
Liscio
LEDGER SYNC
Core to Your Firm's Tech Stack
xero
UltraTax CS
FreshBooks
docusign
INTUIT ProSeries Tax
taxcalc
ProSeries Tax

Power Your Entire Tax Prep Workflow

From client engagement to sharing and storing final returns, SmartVault addresses all aspects of your tax prep workflow, saving you up to 10 minutes per return with automated document routing and organization.

Watch Now

Ready to see how SmartVault's document management and client portal platform can power your firm?

SmartVault.com

SmartVault

✓ SOC 2 Type 2 Certified
✓ 15+ Years of Accounting Focus
✓ Serving 3M+ Global Users
✓ Protecting 500M+ Documents
✓ Industry-Leading 97% Client Retention