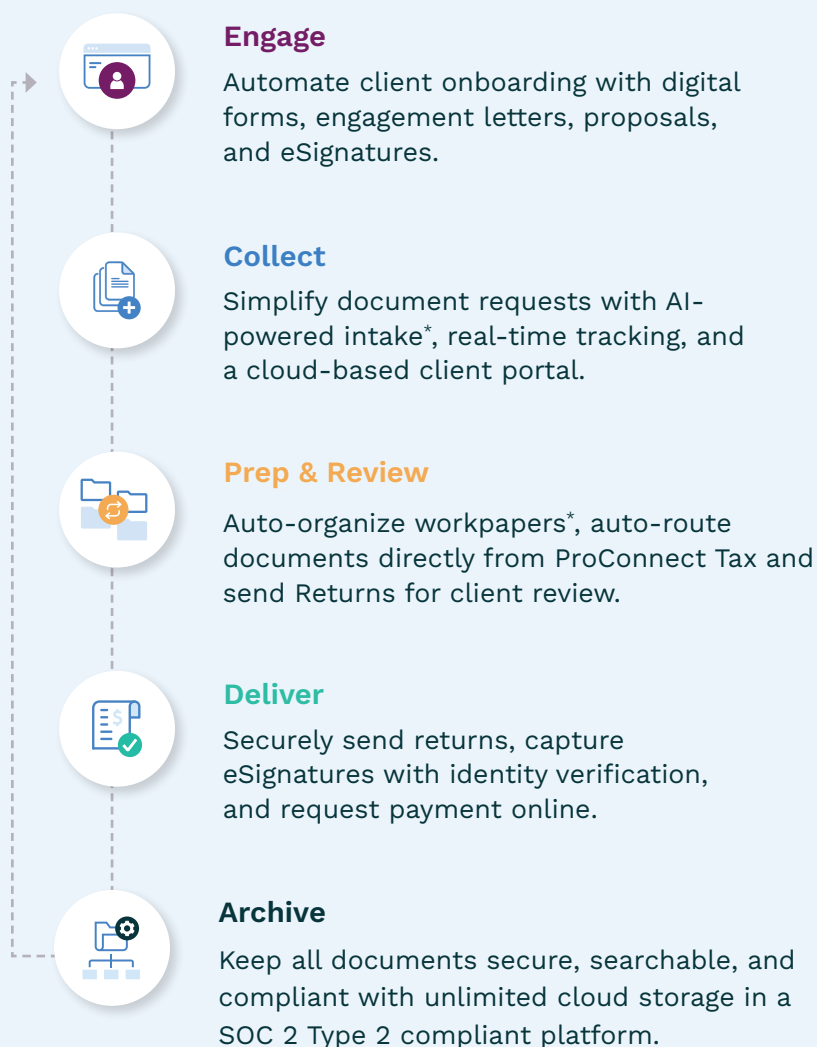


# From Prep to Archive — Power Your Entire Document Workflow



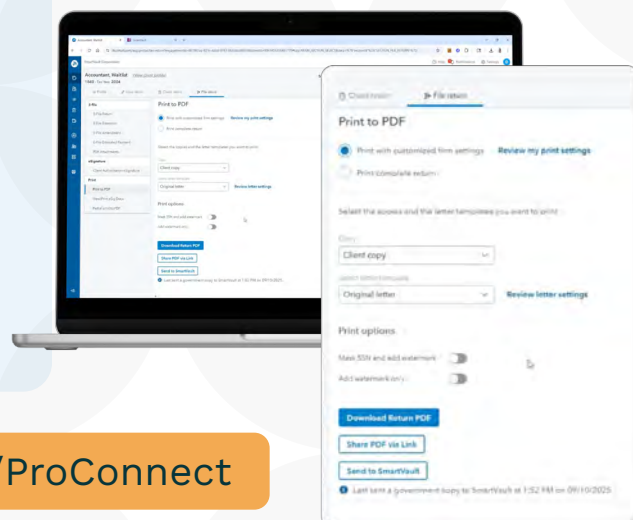
The only document management system and client portal built directly into ProConnect, helping firms save time, reduce errors, and deliver an exceptional client experience.

## Your Workflow: Now Simple, Secure, Automated



## Most Powerful Automations

- ▶ Clients auto-created in SmartVault from ProConnect
- ▶ Folder structures and permissions auto-set
- ▶ Tax returns auto-routed by client and year
- ▶ SmartRequestAI™, AI-powered intake and questionnaires\*
- ▶ Workpapers auto-organized and ready for review\*
- ▶ Returns delivered with automated eSign + KBA authentication
- ▶ Secure archive with audit trails & compliance logs



**Schedule a demo:** [www.SmartVault.com/ProConnect](https://www.SmartVault.com/ProConnect)

## Key Benefits of Using SmartVault with Intuit ProConnect Tax

As the only document management system with a jointly-developed API, SmartVault offers unique advantages that boost efficiency, enhance security, and improve client collaboration. Explore the key benefits of this powerful partnership:

### Secure Client Engagement

Enable clients to safely upload documents and eSign forms while keeping everyone informed with automated notifications. With SmartRequestAI\*, you can auto-generate personalized document request lists and custom questionnaires from prior-year returns, giving clients clear, relevant instructions while saving your firm 60–90 minutes per return.

### Workflow Management

Track tax returns, organizers, and client interactions through an intuitive dashboard, with customizable workflows for annual, one-time, or ad-hoc engagements.

### Anytime, Anywhere Access

Improve responsiveness and productivity with 24/7 mobile accessibility to all your documents.

### Unlimited Scalability

Grow your practice without limits, leveraging SmartVault's unlimited storage and client capacity.

### Uncompromising Security and Compliance

Ensure data privacy and meet industry compliance needs. We're Soc 2 Type 2 Compliant.



**A Decade-Long History:** SmartVault is the only document management and client portal platform that integrates with Lacerte®, ProSeries®, ProConnect™, and QuickBooks®.



SmartVault is a document management and client portal platform built for accounting professionals.

**15 years+**  
in Business

**18,000+**  
Intuit Users

**3 Million+**  
Global Users

**97%**  
Retention

**500 Million+**  
Docs Stored

**Soc 2 Type 2**  
Compliant