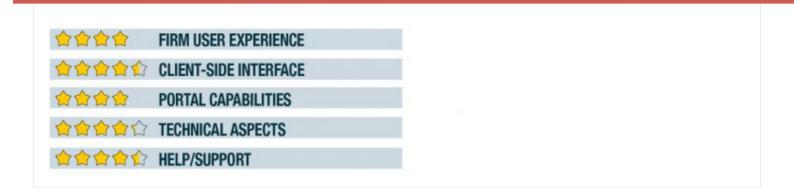
CPA

Practice **Advisor**

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781-356-5152

www.XCMsolutions.com

2012 Overall Rating 4.25

Best Fit

Firms using or considering the broader XCM Workflow Management system to provide structured digital management of their engagements, including the ability to securely share files with clients.

Strengths

- Simple client interface
- No storage or bandwidth/transfer limits
- Customizable firm branding
- Two-way firm/client sharing and collaboration
- Dependable hosting, security and uptime

• Broad support for mobile devices

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streamlined way to manage everyday engagements in a mid-sized or larger practice, offering digital binders that help track all processes, documents, staff and communications within a practice. The XCMportal module is a natural extension of this system, enabling users to securely send and receive engagement-related documents. Pricing is based solely on the number of firm users, starting at \$500 annually for up to 15 firm-side users.

Firm User Experience 4

Client User Experience 4.5

Portal Capabilities 4

Technical Aspects 4.25

Help/Support 4.5

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