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Portal for Professional Services system, which is designed to help streamline the gathering, organizing and sharing of financial documents from clients for time-crunched accountants, CPAs, bookkeepers, and other busy tax and finance professionals.

Isaac M. O'Bannon • Sep. 11, 2014

Cloud document storage provider FileThis has released its new **FileThis Document Portal for Professional Services** system, which is designed to help streamline the gathering, organizing and sharing of financial documents from clients for time-crunched accountants, CPAs, bookkeepers, and other busy tax and finance professionals.

The customizable service offers professional services a new way to help their clients with organizing their tax and financial documents. The fully automated and firm branded service fetches client bank statements, bills, and tax related documents, like W2s from hundreds of financial institutions including banks, brokerages, retirement funds, wealth management services and payroll providers and organizes them in an easy-to-use digital filing cabinet.

FileThis for Professional Services lets tax and finance pros access shared client documents through an easy-to-use administrative web console at the moment they are ready. Tax and finance managers can also obtain multiple client statements and bills at once, pre-schedule their work and load levels, and know when monthly or end-of-year documents will arrive.

“For decades, the accounting world has been plagued by the paper chase, which often ate up valuable hours of their day. Now, FileThis Professional Services brings much needed automation to the industry to help increase productivity, cut down on stacks of papers, and keep offices and clients organized,” said Brian Berson, co-

founder and CEO of FileThis. “Because of FileThis Pro Service’s fetching and auto-

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said Darren Root, CPA, CITP, CGMA, and CEO of RootWorks LLC.

FileThis is available now and offers multiple plans to allow small, medium and large businesses to take advantage of its automated document fetching and filing solution.

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