CPA Practice **Advisor**

2015 Innovation Award Nominee:

FileThis Pro

FileThis.com

FileThis Pro is a new cloud-based service, aimed at streamlining 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 tax and accounting pros a revolutionary new way to help their clients with organizing their tax and financial documents. Clients using FileThis enjoy a fully automated and branded service that fetches their 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 Document and Client Portal lets tax and finance pros access shared client documents through an easy-to-use administrative web console at the moment they are ready. Now, tax and accounting managers can 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. FileThis Pro also integrates with all leading cloud services, including SmartVault.com.

Click here to see all of the other nominees for the 2015 Innovation Awards.

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