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Professionals. Securely collaborate with your clients, keep live account info, and more.

Apr. 04, 2018



My CPA Dashboard is a comprehensive CRM application that allows your practice to seamlessly collaborate with clients, it works great for CPAs, Bookkeepers and Tax Professionals.

Easy Communication – Securely communicate directly with your client rather than going through your emails and spending time on the phone.

Connect Accounts – With the highest level encryption as a safeguard, connect their bank accounts so you will receive a monthly statement of their bank transactions.

Seamless File Management – Exchange all sorts of files and save them under folders marked by year and quarter.

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