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season is upon us, and spring tax season will be here soon (there's always a tax season looming...), I checked in with some members of the CPA Practice Advisor community ...

Gail Perry • Sep. 15, 2018



What are your favorite tools for getting and staying organized? As the autumn tax

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- **Google Drive** – This cloud storage option allows you to not only free up storage space on your own computer and other devices, you can access your files from anywhere. Similar options include Microsoft's **OneDrive**, **DropBox**, **Apple iCloud**, and there are others. Whichever cloud storage option you choose, you're likely to find that once you try cloud storage, you won't want to go back to hard drive storage.
- **FileThis** – Use this app to connect to your accounts from utility companies, banks, credit cards, and service providers. The app automatically fetches, downloads, and stores monthly invoices in a central, organized place on the web. Your clients can give you access to their account so that you can retrieve any statements you need.
- **Quicken** – According to Sleeter, this is “Still the app of choice for home bookkeeping.” Quicken is the first personal finance app I ever used, and I found it to be startlingly easy and extremely useful. Several of my tax clients still use Quicken to organize their personal financial records, and the statements they send me make tax prep a breeze.
- **Expensify** – If you need to track, submit, and store expense receipts, Expensify will do all of that for you.
- **Bill.com** – Sleeter says Bill.com is a “Great app for handling all business and personal payables and receivables.” Use Bill.com to pay invoices, get approvals from your team, view your payment history and audit trail, create and send invoices to customers, track invoices and incoming payments, and get paid directly to your bank account.

Samantha Mansfield, director of professional development and community at CPA.com, said, “I am not a preparer, so from someone that submits files I use **Genius Scan**. It is easy to use. The version you pay for allows password protecting the file, and it cleans up the images when you are “scanning” with the camera on your phone. The free version of Genius Scan let's you scan images and save them as PDFs.

The paid version can save documents as JPEGs and exports directly to several cloud

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Kacee Johnson, strategic advisor at CPA.com, recommends, [SafeSend Returns](#). "It digitizes the complete tax assembly and delivery process. I also love that it provides visibility to the firm on the status of their clients' returns while delivering reminders to the tax payer on important dates with amounts due!

Chris Hooper, CEO of Accodex, is a fan of [Receipt Bank](#). "It enables us to have a permanent, online record of all receipts and invoices that the client has received over the year in order to substantiate their deductions on their tax returns.

Finally, **Harjit "RJ" Virk** recommends the personal finance tool, [Mint.com](#). "I use it myself and recommend it to friends, family and clients. It builds simple and easy budgets and tracking of income and expenses."

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What apps do you love? Let Gail know: gail.perry@cpapracticeadvisor.com.

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