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send bookkeeping and tax docs by regular mail, or via email? The Doc.It client portal is perfect for firms of 3 or more accountants. Download the guide to learn more.

Aug. 29, 2019



## Choosing a Client Portal for Your Accounting Firm

How does your firm exchange important financial documents with clients? Do

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- Ease of use features
- PBC lists
- eSignature integration
- Secure file storage and sharing
- Building your firm brand

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Accounting • Firm Management

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