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ACCOUNTING & AUDIT

Protect Client Documents with a Secure Portal

How does your firm exchange important financial documents with clients? Do clients 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 clients send earnings statements and tax documents by regular mail, or as email attachments? These methods are not secure for sending confidential client documents. A client portal site offers a simple, secure solution. Accountants and clients can log into a portal to upload, share and view documents, files and messages.

Now there's a new white paper checklist to help you evaluate and select a portal for your firm. The guide, **“Choosing a Client Portal for Your Accounting Firm”** offers a clear explanation of client portals, plus a checklist of 12 factors to consider when selecting a client portal, such as:

- Ease of use features
- PBC lists
- eSignature integration
- Secure file storage and sharing

- [Building your firm brand](#)

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