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SafeSend Exchange has redefined secure document transfer in the tax and accounting profession. SafeSend Exchange includes all the core features of traditional client portals and file share systems, such as large file transfer, secure document exchange, client drop box, and long-term storage. More than 1,200 firms have implemented this solution as part of their email signature, for easy-to-find and use client access.

However, SafeSend Exchange is the ONLY system that provides a solution for overcoming the challenge of taxpayers that want their data sent via email. SafeSend Exchange allows a firm to automatically encrypt email attachments right from within Outlook.

- Easy-to-use Microsoft$^®$ Outlook add-in
- Convert files to PDF on the fly
- Apply watermarks and document restriction
- Encrypt attachments with the client's password
- Built-in automated password manager (patent pending)
- Q&A authentication means secure client access without a password

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