

Breaking New Ground: RLJ Financial's Success Story with SmartVault-Liscio Integration

Caleb L. Jenkins, EA, CQP, RLJ Financial, created a modern workflow that saves time, enhances client service, and keeps data secure.

"I've been using the SmartVault and Liscio integration since it was released, and it has revolutionized our document management and client communications. Liscio serves as our client-facing portal, while SmartVault handles internal document management. The seamless integration between the two allows us to effortlessly manage and share documents with clients in a secure and efficient manner.

One of the standout features is the ability to upload documents directly from SmartVault into Liscio messages without having to download/upload, ensuring that clients have instant access to important files. This integration has saved us dozens of hours and has reduced errors and duplication of work in document handling.

Additionally, the robust security features of both platforms give us peace of mind, knowing that our clients' information is protected in compliance with IRS regulations. The combined use of SmartVault and Liscio has streamlined our workflow, improved client response times, and enhanced our overall service delivery.

I highly recommend the SmartVault and Liscio integration to any accounting firm looking to improve their document management and client communication processes. This powerful combination ensures efficiency, security, and a modern client experience."




Caleb L. Jenkins, EA, CQP


Tax Professional & Certified
QuickBooks ProAdvisor

Leader of Client Accounting
Services at RLJ Financial

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 **SmartVault:** A cloud-based document management system designed specifically for accounting professionals.

 **Liscio:** A modern client experience platform that centralizes communication, document collection, and task management.

Schedule a demo:
www.SmartVault.com/liscio

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www.Liscio.me