

Creating Annual Savings: How Liberty Tax Services Consolidated Their Tech Stack

Liberty Tax Services | Tax and Accounting

Carolle Ryan is a franchisee of Liberty Tax Services, one of the nation's fastest-growing tax preparation companies. Her firm serves nearly 1,000 clients and processes over 700 individual tax returns each year.

The Challenge of Managing Growth in a Busy Tax Practice

Carolle and her team relied on Microsoft-based tools to manage their documents and client communications, but these generic solutions weren't built to handle the unique needs of a busy tax practice. The cumbersome processes and lack of tax-specific features made it difficult for Carolle's team to stay organized and responsive to clients.

Recognizing the urgent need for a comprehensive document management and client portal solution, Carolle set out to find a better alternative.

Moving From Generic to Purpose-Built Software

Carolle's search led her to [SmartVault](#), a cloud-based document management and client portal platform designed specifically for accountants. By upgrading to the Accounting Unlimited plan, Carolle was able to consolidate her firm's document management, client portal, and proposal/contract generation processes into a single, streamlined platform. This allowed them to discontinue the use of two other programs, resulting in cost savings of over \$5,000 per year.

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The Accounting Unlimited plan also gives Carolle and her team a range of advanced features, including unlimited eSignatures, Knowledge-Based Authentications (KBAs), proposals, forms, and more. They can quickly [create custom forms and proposals](#) from scratch or industry-specific templates. Clients can easily review, complete, and electronically sign documents from the comfort of their own devices, without the hassle of printing, scanning, and mailing physical paperwork. The completed documents are automatically saved in the client's folder and the firm is notified when the client completes the task.

This not only streamlines the process for clients but also eliminates the time-consuming tasks of manual data entry, form creation, and document organization for Carolle's team.



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Delivering a Modern Client Experience

“SmartVault has become a one-stop place for storage, portals, encrypted email, auto-filing, electronic signatures, and now proposals,” Carolle explains. Many of the firm’s clients have embraced the [client portal](#), providing positive feedback on the enhanced user experience. Clients can easily share, access, review, and eSign documents from wherever they’re located, fostering a sense of collaboration and transparency.

Positioned for Continued Growth and Success

By leveraging the power of SmartVault’s Accounting Unlimited plan, Liberty Tax Services has been able to transform its workflows, enhance client and staff experiences, and drive tangible cost savings. Carolle and her team can now focus on delivering exceptional service to their clients, secure in the knowledge that their operations are optimized and secure.

“I would highly recommend SmartVault to others in the accounting and tax preparation industry who are looking to modernize their practice and provide an exceptional client experience,” Carolle concludes.

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