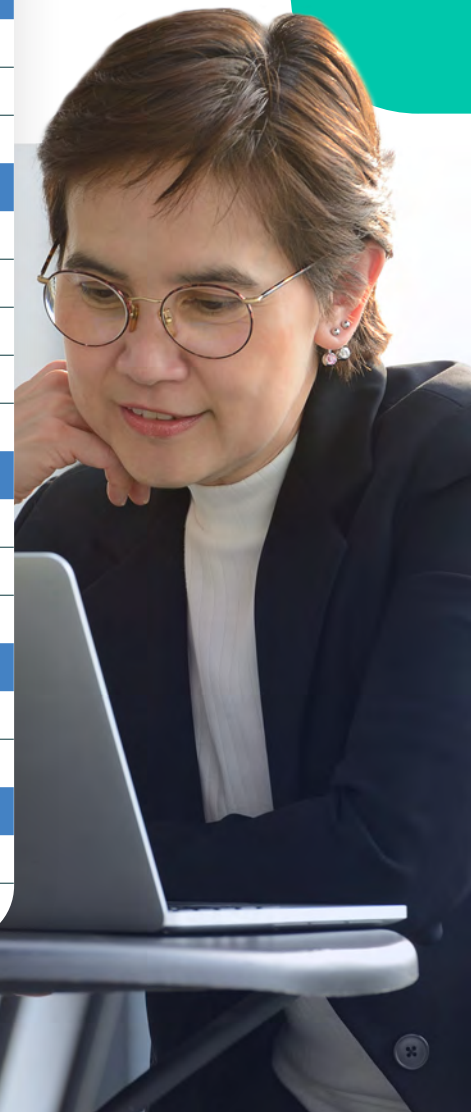


SmartVault vs. ShareFile™



ShareFile is a general file sharing solution that lacks the specialized features accounting firms need. SmartVault's 15+ years of relentless accounting focus means we truly understand and support your needs.

	SmartVault	ShareFile
Client Engagement		
Client Intake Form	✓	✗
Pricing Engine & Quoting	✓	✗
Engagement Letters w/ eSignature	✓	✗
Accept Payment	✓	✗
Client Onboarding		
Automated Folder Structure Creation	✓	✗
Customizable Client Organizer	✓	✗
Secure Document Collection	✓	✓
Document Management		
Cloud-Based 24/7 Access	✓	✓
Unlimited Storage and Clients	✓	✗
OCR of Scanned Documents	✓	✗
Integration with Tax Systems	✓	✗
Version Control/History	✓	✓
Client Portal		
Included in DMS Price	✓	✓
Custom Branded Portal	✓	✓
Integrated eSignature Workflows	✓	✗
Security & Compliance		
FINRA, SEC, GLBA Compliance Support	✓	✓
SOC 2 Compliant	✓	✓
Platform Reliability		
Specialized for Accounting	✓	✗
Mobile Access	✓	✗



The Hidden Costs of Using ShareFile

- ✗ **Limited Engagement Tools:**
Requires multiple platforms, adding complexity and increasing errors.
- ✗ **No Accounting-Specific Features:**
Wastes time trying to adapt generic tools to specialized workflows.
- ✗ **Manual Setup of Folder Structures:**
Takes time better spent on client work.
- ✗ **Basic Document Management:**
Not equipped to handle modern accounting practice needs.

The Advantages of Using SmartVault

- ✓ **Accounting-Specific Features:**
Unlike general file-sharing services, SmartVault's dedicated accounting tools streamline your document handling and compliance needs.
- ✓ **eSignatures & Tax System Integrations:**
Direct integrations with Intuit Lacerte, ProSeries, and UltraTax CS empower firms to work efficiently without needing multiple platforms.
- ✓ **Enhanced Security:**
SOC 2 Type 2 compliance and bank-grade security protect sensitive data.
- ✓ **Advanced Document Management and Client Portal:** Unlimited storage, advanced document capabilities, and integrated portal help you scale while improving client service.

“

SmartVault helps us provide personalized services to our clients, increase collaboration, and create stability and security in our workflows.”

Diane Curtis

Affiliated Financial Services

Streamline Your End-to-End Tax Preparation Workflow



Add Unlimited Clients

Say goodbye to duplicate data entry and account configuration. SmartVault auto-creates client profiles, security permissions, users, and folder structures.



Engage and Onboard

Create any document, form, quote, and request list. Clients can review, submit source docs, and eSign from anywhere, on any device. All documents are automatically saved to the correct folder.



Auto-Route Returns

Print and auto-route tax returns directly into the correct SmartVault client folder by tax year. This automation saves you time, eliminates human error, and makes managing large volumes of returns easier.



Accelerate Reviews

Send clients their returns through the portal, enabling them to review, approve, and eSign (with knowledge-based authentication) 100% online. Monitor the status of tax returns, organizers, and client interactions through an intuitive dashboard.