SmartVault vs. Drake Documents®

Drake Documents is an afterthought in Drake's tax software suite, falling short in providing the comprehensive and compliant document management tools modern accounting firms need.

SmartVault

The Hidden Costs of Using Drake Documents

✘ **Limited functionality for lots of $$$:**
Crucial features like eSignature are add-ons, and the system lacks major features accountants need.

✘ **Inflexible system:**
Limited integration options restrict your firm's ability to customize workflows and force you into disjointed systems.

✘ **Constrained growth:**
No unlimited cloud storage or client capacity, potentially forcing difficult decisions as your firm scales.

The Advantages of Using SmartVault

✔ **Comprehensive client engagement tools:**
Custom fillable PDF forms and engagement letters, coupled with integrated eSignature and modern source doc requests, streamline client interactions.

✔ **Flexible and scalable:**
Ability to link multiple clients, unlimited cloud storage, and seamless integrations with multiple tax prep systems allow your firm to grow without constraints.

✔ **Enhanced collaboration:**
Real-time staff collaboration, custom request lists, and a branded portal improve efficiency and client satisfaction.

SmartVault offers a modern, efficient, and reliable solution for accounting firms.

15 years+
in Business

3 Million+
Global Users

500 Million+
Docs Stored

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.

SmartVault vs. Drake Documents®

	SmartVault	Drake
Client Engagement		
Client Intake Form	✔	✔
Pricing Engine & Quoting	✔	✔
Engagement Letters w/ eSignature	✔	✘
Accept Payment	✔	✘
Client Onboarding		
Automated Folder Structure Creation	✔	✘
Customizable Client Organizer	✔	✔
Secure Source Document Collection	✔	✔
Document Management		
Cloud-Based 24/7 Access	✔	✘
Print and Auto-Route into DMS	✔	✘
Link multiple clients to one vault	✔	✘
OCR of Scanned Documents	✔	✘
PDF to Print functionality	✔	✔
Integration with multiple tax prep apps	✔	✘
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	✔	✘
Unlimited Storage and Clients	✔	✘

> "My clients upload documents directly into designated folders. This has saved me countless hours of admin work and given my clients an easy, secure way to submit their paperwork."
>
> **Amanda Leddington**
> A.H. Financial Management Services

SmartVault: Built for Accounting Pros, Designed for Growth. Schedule a demo today!

Visit SmartVault.com

SmartVault