

SmartVault vs. SafeSend®



While SafeSend offers strong tax-specific capabilities, SmartVault provides a comprehensive solution that grows with your practice.

The Hidden Costs of Using SafeSend

- ✗ **Restrictive Functionality:**
Limited scope focuses primarily on tax processes, leaving gaps in year-round document management needs.
- ✗ **Integration Challenges:**
Lack of integration with popular accounting software like Intuit® limits its usefulness outside of tax season.
- ✗ **Workflow Complexity:**
Creating separate systems for tax and non-tax work increases complexity and potential for errors.

The Advantages of Using SmartVault

- ✓ **Versatile DMS:**
Provides comprehensive support for both tax and non-tax documents, allowing firms to manage year-round operations seamlessly.
- ✓ **Extensive Integration:**
Integrated support with popular tax and accounting platforms, including Intuit® and Thomson Reuters®, allows for continuous workflow.
- ✓ **Enhanced Security:**
SOC 2 Type 2 compliance and bank-grade security protect data and support compliance.
- ✓ **Advanced Document Management:**
24/7 cloud-based access with advanced document capabilities, an integrated client portal, and unlimited storage help you scale while improving client service.

“

SmartVault has become a one-stop place for storage, portals, encrypted email, auto-filing, electronic signatures, and proposals. I would highly recommend SmartVault to others who want to modernize their practice and provide an exceptional client experience.”

Carolle Ryan
Liberty Tax Service

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. SafeSend®

	SmartVault	SafeSend
Client Engagement and Onboarding		
Client Intake Form	✓	✗
Pricing Engine & Quoting	✓	✗
Engagement Letters w/ eSignature	✓	✓
Ability to Bulk Send Engagement Letters	✓	✗
Accept Payment	✓	✓
Automated Folder Structure Creation	✓	✗
Customizable Client Organizer	✓	✗
Document Management and Client Portal		
Specialized for Accounting	✓	✓
Secure Document Collection	✓	✓
Cloud-Based 24/7 Access	✓	✓
Unlimited Storage and Clients	✓	✗
OCR of Scanned Documents	✓	✗
Integration with Thomson Reuters UltraTax CS	✓	✓
Integrated with Intuit Lacerte	✓	✓
Integrated with Intuit ProSeries	✓	✗
Intuit ProConnect Integration (2025)	✓	✗
Version Control/History	✓	✓
Custom Branded Portal	✓	✓
Integrated eSignature Workflows	✓	✓
Seasonal Worker Licenses	✓	✗
Security & Compliance		
FINRA, SEC, GLBA Compliance Support	✓	✗
SOC 2 Compliant	✓	✗
Granular User Permissions	✓	✗



SmartVault: Built for Accounting Pros, Designed for Growth. [Schedule a demo today!](#)

[Visit SmartVault.com](https://www.smartvault.com)

SafeSend is a trademark of SafeSend.