Work Less, Earn More

How to Build a Self-Sustaining Accounting Firm

A Guide for Intuit® Users

SmartVault

Contents

Introduction

> **"I want to start a business to consume my life and make it more difficult!"**

... said no one ever. Going into business for yourself ... It sounds liberating. Empowering. Lucrative.

If you have ever transitioned from working for an accounting firm to running one, you know better. It starts off just fine. Your firm was just you. No more annoying boss! You had a few clients ... you wore many hats ... it was exciting!

Before you know it, you're chained to your desk, cramming work into nights and weekends just to stay afloat. No family time, no rest, no travel or passion projects. Just a constant hustle where you never seem to get ahead, running to stand still. And if you have employees, you become the annoying boss.

Consider this guide a prison break. You've done the hard part: build a firm with a robust book of business, so robust that you never get a moment's peace. Now comes the fun part — creating a firm that lets you transition from being an operator trapped within the business to someone who can step away without worrying about everything falling apart..

By creating a self-sustaining firm, you gain more of the one resource that never gets replenished – time. This is time you could be spending...

Performing high-level tasks to actually grow your business into a powerhouse firm, building a financial legacy that will last for generations.	Bonding with your spouse, friends, or other loved ones, investing time and attention into your children or grandchildren.	Cultivating hobbies, having adventures, and checking items off your bucket list.

No one looks back at the end of their life and says, "I wish I had spent more time at the office." Let's invest now in the satisfying accomplishments of tomorrow by creating a self-sustaining firm!

Systematizing Operations

When we start a new endeavor, we often fly by the seat of our pants. We learn as we go, building the airplane in mid-air. Every decision is subjective because it's being made for the first time. It takes a lot of brainpower — and skilled brainpower at that! Every CPA question needs a CPA to answer it.

But as the firm evolves, the decision-making starts to simplify. Your clients have a limited menu of problems, each of which you have seen multiple times, and you have developed cookie-cutter solutions to those problems – or at least a standardized approach to solving them.

The same goes for the back end of your business. Your non-client-facing operations follow predictable patterns. You can start to turn off your brain and copy/paste.

This is where you can start to systematize. Systematization involves defining the processes that make your business work and taking them out of your brain into SOPs, training modules, and guided experiences.

Systematization enables you to hand complicated responsibilities to subordinates within your organization. They may not have your experience and CPA skills … but they don't need to. They only need to follow your systems, which will eventually cover most, if not all, of the common problems and processes your business will encounter.

My fiancé and I just went to Bali for two weeks and our firm ran completely fine without me there."

Nick Boscia, CPA, EA, partner at Boscia & Boscia, knows firsthand the struggles of running an accounting firm. "There was a time where it was just me, my brother, and my dad," he recalls. "We were doing it all."

The pursuit of growth came at the cost of personal time and well-being. "I was getting what I wanted – a lot of new clients – but I was also getting what I didn't want: working a ton of hours and not taking vacations."

How'd he go from no vacations to regular trips away from the office? Hear his strategies, as well as insights from TOA Global founder Nick Sinclair, on this webinar, "What to Consider When Building a Self-Sustaining Firm."

Watch the Webinar

Process Mapping

Process mapping is a worthwhile exercise at any stage of business development, but it is especially important as you begin to systematize operations. It involves creating a visual diagram of any business process you undertake.

This could take the form of a "mind map" or flow chart, which lists the different steps and stages of the process sequentially.

It could be a process that one team member is responsible for executing or that multiple team members contribute to. Color coding or other differentiations can assign stages in the process map to a particular team member or department.

Most importantly, this is the first stage of getting a sequential process out of a person's mind and into the real world. You may have executed these processes intuitively, without thinking, and never paused to catalog every step that goes into the process.

Once you start to chart them out, however, you can identify opportunities for delegation, outsourcing, or automation to help take steps of the process off your plate.

Templates, Checklists, and Cloud-Based Documentation

Once you have every critical business process mapped out, it's time to organize them into templates and checklists. A template is a standard procedure that team members further down the chain can follow.

The goal is to make it so clear, so "cut-and-paste," that even a non-CPA could follow the template and recreate your expert decision-making process. This is because you have organized the process into a template, with as many "if-then" decision guides as possible.

A checklist is a list of "to-do" items that employees down the chain can execute to make sure that no steps are missed. If every item on the checklist doesn't apply to every client or every iteration of the process, provide as many "if-then" scenarios as possible to help the responsible employee determine if a step can be omitted. But if the employee does something redundant, it's not the end of the world — better to cover too *many* bases than too few.

The fact is, you may *never* be able to cover every possible situation with a template or checklist. But you can use it to transfer the *lion's share* of the process off of your plate and make your firm far more self-sustaining. Your team can always come to you with whatever questions arise … and as they become familiar with your decision-making process, the need for you to weigh in will arise less and less frequently.

Processes to Systematize

With a little creativity and outside-the-box thinking, almost *any* process an accounting firm performs can be systematized. A short and not-at-all-exhaustive list might include:

- Tax preparation and filing
- Client onboarding
- Client offboarding
- Document management and retention
- Data entry

- Record-keeping
- Budgeting and forecasting
- Invoicing and billing
- Financial reporting
- Payroll processing
- Expense management

- Audit preparation
- Client communication
- Compliance monitoring
- Account reconciliation
- Internal audits and quality checks

Let's take a closer look at client onboarding.

Manually adding new clients to your system can be a painful waste of time. With SmartVault, you can create customized folder structures based on things like client or project types, so as you add new clients, their folders are automatically created for you. Tax attorney Eric Green, Esq., has mastered this process, so much so that he says his process saves his firm $150,000 every year.

Automating this process not only saves money (and time), but also creates firm-wide consistency. "The consistent folder structure in SmartVault has been a game-changer for both clients and our team. Clients always know where to find their documents, and our staff can easily locate files when covering for each other," Dawn Brolin, CPA, CFE explains. "If I need to go to a conference for a week, my tax partner can go into SmartVault and have everything he needs to prepare a client's tax return. I don't have to email him a link – he just knows where to go because it's so consistent with our folder structure. This consistency significantly boosts our productivity, especially during tax season when we aim to be productive rather than just busy."

Lacerte Firm Doubled Client Base

This is the story of how one firm doubled its client base, dramatically improved retention, and achieved the holy grail of the accounting world: making more money while working less.

The dream of a truly self-sustaining firm – that makes more money while you work less – often seems out of reach. But for Nick Boscia, CPA, EA, partner at Boscia & Boscia PC and founder of The Balanced Firm, this dream became a reality. By implementing SmartVault and improving efficiency, security, and client service, Nick transformed his New Jersey-based accounting practice from a time-consuming operation into a streamlined, profitable business.

Challenge: Inefficiency Hindering Growth

"Operating our tax practice was really difficult before we implemented SmartVault," Nick says. "Collecting and sharing documents with clients was incredibly inefficient and time-consuming because our clients followed different processes.

"They were either dropping off physical paper and then we'd have to scan it – and obviously that's super inefficient – or they'd send us documents in an unsecured email," Nick explains.

These disjointed, manual processes wasted time and made it nearly impossible to effectively manage client information. Using emails also put the firm and their clients' data at significant risk.

As the firm grew, these inefficiencies became more pronounced. "We started hitting capacity issues," Nick recalls. "We were getting new clients and increasing revenue – which was great! – but then I was working a million hours and spearheading every process from client onboarding and on."

The risk of burnout loomed large, not just for Nick but for his entire team.

Vision: A Self-Sustaining, Balanced Firm

Nick's goal was clear: he has always wanted a self-sustaining – or as he calls it, a balanced – firm that can operate without him there. This vision aligns with his personal goal of exploring the world. "If I have to be in my firm every day working for it to operate, I'd never be able to go on vacation and do the things that I love outside of work," he explains.

Creating a self-sustaining firm – which involves solving many common challenges like document source collection – takes a lot of grit, determination, and passion.

But it also takes the right tools and processes.

"I knew I had to make changes in firm operations and that I needed to start with technology."

Nick Boscia, CPA, EA

Partner at Boscia & Boscia PC
Founder of The Balanced Firm

linkedin.com/in/nickboscia

Solution: Implementing SmartVault

In 2019, Boscia & Boscia implemented SmartVault, a document management and client portal platform designed to address their pain points. The timing couldn't have been better. "We implemented in 2019, and in 2020 COVID happened. A lot of accounting firms were struggling to get documents, but we already had SmartVault in place," Nick notes.

Result: Doubling Business Without Burnout

The impact of SmartVault was immediate and significant. "We doubled our client base because of SmartVault," Nick shares. SmartVault's secure client portal enables the firm to send electronic document request lists to its clients. Clients then upload the documents directly into the portal, where they're automatically organized. This allows the firm to handle a much larger volume of clients efficiently. "This alone has had an unbelievable impactful on our firm."

One of the key features Nick highlights is the granular access permissions in SmartVault. "We have internal folders that we don't necessarily want the clients to see with things like email correspondence or quotes," he explains. The firm can maintain a clean, user-friendly interface for clients – who can go into the portal and quickly find what they need – while keeping internal documents secure. "Our clients like having secure access to their documents and tax returns in SmartVault because it's accessible 24/7 from wherever they're located."

The integration with their tax preparation software further enhances efficiency. "We use Intuit Lacerte. The direct integration with SmartVault automatically builds out all our folders for every single client. It also pulls in their emails and invites them to make a SmartVault account," Nick explains.

SmartVault also integrates with the firm's practice management software, Financial Cents. "We've had Financial Cents for a year, and it just keeps getting more beneficial for our firm," Nick notes. The integration further streamlines processes like client creation. When you create a client in SmartVault, it automatically populates in Financial Cents, so you don't have duplicate data entry.

A Model for Modern Accounting Firms

By leveraging technology solutions like SmartVault, Boscia & Boscia has created a model for what a modern, self-sustaining accounting firm can look like. They've achieved the seemingly impossible: doubling their client base while improving work-life balance and increasing profitability.

Nick's parting advice to other firms? "Be curious to try to solve any of your firm's pain points. If you're not living your dream life, there are tools out there to make your firm better and give you the life you want." And what about traveling? Well, as Nick concludes: "My fiancé and I just went to Bali for two weeks and our firm ran completely fine without me there."

Building a Team You Can Trust

Systematization goes hand-in-hand with hiring. After all, once you document that beautiful, efficient system, you need a pair of hands into which to entrust that system. That way, someone *else* can execute the system for fair compensation, freeing up *your* time for higher-value tasks.

Every organization is [only as good as the people](#) who run it. Accounting firms are no different. The right hire can make your firm; the wrong hire can break it. When it comes to hiring, timing and execution are everything.

When to Start Hiring

Figuring out when to start hiring is a tough needle to thread. If the team is overstretched, with higher-level team members spending too much time on administrative and other low-level tasks, hiring would obviously help. But there needs to be enough revenue stability or enough growth opportunity to justify extra salaries.

If you find that your plate is full with enough business to keep you constantly overwhelmed, it's time to start thinking about hiring. But your team can't miss a beat. If there is an interruption in quality of service, you could lose clients and the revenue base that justified the hire could disappear.

So you *must* invest time in process systematization so you have defined role to slot that hire into. All the work you do in process systematization will pay off when your new hire is able to hit the ground running.

From a sheer calendar standpoint, the slow season is the perfect time to think about hiring. That way, your new team can be trained and in place in time for the next tax season.

Operations Manuals

The best way to get your new hires up to speed with those freshly systematized processes is through the creation of operations manuals. Operations manuals flesh out your process maps in detail. By reading and following the operations manual, your new hires should be able to reproduce all (or at least most) of the results that you produce when the task is in your hands.

If possible, generate an operations manual for each process. You can also segment manuals by role, but keep in mind that sometimes you may find it prudent to re-delegate a task to a new team member. That might be hard if that process is grouped into an ops manual for an entirely different role. If you create your manuals by process rather than role, you can mix and match as your team member evolves and grows in their job.

Embracing Global Talent

Nick Sinclair, founder of TOA Global, advocates for considering global talent pools. "The accountants that you get globally are just as good, or some of our clients would argue, better than their local team," he states.

This approach can provide access to skilled professionals while potentially reducing costs. However, he emphasizes that success with global teams depends heavily on having the right structures, processes, and leadership in place.

3 Tips to Build a Team That Drives Growth

Embrace the Global Talent Pool

Global talent can excel across all roles, from junior bookkeepers to senior managers, with quality often surpassing local teams.

Set the Team Up for Success

Implement efficient, repeatable processes and plan for long-term scalability to ensure sustained success.

Prioritize Clear Communication

Establish clear communication, align working hours, and ensure the team can access information for collaboration.

Training, Accountability, And Staffing Models

Once your staff is hired, they need to be trained. Ideally this doesn't take up a substantial amount of your time. Study of the *operational manuals* can help them get up to speed, but most people learn better through demonstration.

That's another reason why it's important to choose the right software partners. You'll want vendors who provide multiple training options for yourself and your team. SmartVault, for example, offers custom training sessions, on-demand learning courses, robust 'how-to' guides, and more. This helps your team get up to speed on your workflows.

Team members must also be held accountable for the proper execution of their job duties. They can directly report to you, but then you're back in the position of being a bottleneck, making your firm less self-sufficient. Having a middle manager as some sort of quality control check makes your own participation less critical – even if this is a role that you end up contracting out.

As you staff up, it's worth thinking about what kind of staffing model you want to adopt. Some of the most common examples of staffing models for CPA firms include:

The Pyramid Model

Junior accountants at the bottom, senior firm manager at the top, varying stages of middle management in the middle.

The Diamond Model

More emphasis on middle management than junior roles to provide greater expertise and efficiency.

The Boutique Model

A team of specialists, mostly organizational equals offering boutique or specialized services.

The Horizontal Model

A team of mostly equals collaborating through teamwork and direct communication.

The Networked Model

A mostly outsourced team of freelancers and contractors collaborating to provide a unified client experience.

The Departmental Model

Specialized team members grouped into departments, which may grow to include more departmental teammates as the firm grows.

Empowering A Team To Self-Manage

It's all well and good to have a talented team … but if you never give them the leeway to exercise those talents, you will never have a self-sustaining firm. Many business owners have trouble letting go, micromanaging every decision for fear of a quality dropoff now that the task is in someone else's hands.

This is called empowerment failure — your team is not empowered to do their jobs. They feel like they must run everything by you … or you explicitly tell them to run everything by you. You will never extricate your time from firm management that way.

You went to the effort to hire the best people you could and systematize the processes for them as thoroughly as possible. Let them work! Trust them to make decisions within certain parameters. Pay them the compliment of trusting their judgment a little bit, especially once they're seasoned and know the ropes.

You might set a dollar value up to which a teammate is empowered to make a decision without first seeking your permission. This could be $200, $500, $1,000, or more. You will be amazed at how much your phone stops ringing once you give your team even a little empowerment.

Remote, Hybrid, Or In-Office

The digital age has presented every business owner with a choice to establish an in-office team, a remote team, or a hybrid team – that is, a combination of in-office and remote teammates.

Maintaining an in-office team obviously limits your hiring to the local talent pool and local wages. It also adds the overhead of an office expense. However, many firm owners swear by in-office teams, claiming they never get the same productivity out of remote workers.

However, if you systemize your processes well enough, there's no practical reason why a self-motivated new hire can't do just as good a job working from home (or as Nick Sinclair pointed out earlier, from anywhere in the world). Many digital tools exist to track their progress and manage projects. Best of all, you have the whole world to hire from.

Cloud-based software solutions like SmartVault help any kind of team streamline their operations, but is particularly helpful for remote or hybrid teams. With 24/7 secure access, SmartVault's document management system allows your team members to access the documents they need, whenever they need them. It facilitates seamless collaboration with clients and enables team members to pick up where others left off, regardless of locations or time zones.

Embracing Automation

When an entrepreneur wants to take tasks off his or her plate, the go-to question is usually "Who can I hire to do this for me?"

But that's actually not the right first question. The right first question is:

> "Can I automate this task?"

Automation could be as simple as writing an onboarding manual for new clients so you don't have to take your own time (or employees' on-the-clock time) walking them through.

Automation can also be as complicated as a cloud-based app that uses generative AI to answer client questions, maintain regulatory compliance, and suggest data-driven strategic decisions.

Automation is less expensive than hiring, and less prone to error. We covered hiring first, but in truth you should only hire when a task cannot be automated.

Processes and Tasks to Automate

Processes ripe for automation in a CPA firm may include:

- Data entry
- Bank reconciliations
- Expense categorization
- Payroll processing
- Financial reporting

- Invoice generation
- Payment processing
- Accounts payable management
- Accounts receivable management

- Client onboarding
- Document management
- Compliance monitoring
- Appointment scheduling and reminders
- Automation Tools

Build an Automated, Scalable Tax Prep Workflow with Intuit and SmartVault

SmartVault is the only document management and client portal platform that integrates with Lacerte®, ProSeries®, ProConnect™, and QuickBooks®.*

Integrating SmartVault with your Intuit tax prep app provides multiple benefits:

- ▸ **Automate Setup:** Eliminate manual entry with automatic client, folder, and permission creation.

- ▸ **Smart Routing:** Documents automatically filed in correct folders, saving time and reducing errors.

- ▸ **Efficient Tracking:** Monitor tax returns, organizers, and client interactions via intuitive dashboard.

- ▸ **Unlimited Growth:** Scale your practice with unlimited document storage and client users.

- ▸ **Centralized Management:** Access all documents securely from any device.

- ▸ **Enhanced Security:** SOC 2 Type 2 compliant with encryption, MFA, and granular controls.

- ▸ **Client-Friendly:** Modern, branded portal for secure sharing, e-signatures, and payments.

Learn more & schedule a demo

Properly Vetting and Implementing New Tech

Not every automation app is right for every accounting firm. If you buy every shiny object in sight, you may end up with an overly-complicated tech stack full of redundancies and possibly even incompatible with each other.

Instead, follow a systematic process:

1 Begin with the end in mind.

Remember all those processes you systemized? Make a checklist of every process within those systems that can be automated and start looking for software solutions that check boxes off that list.

2 Consider integration and interoperability.

Try to choose software solutions that integrate with your current tech, as well as a robust and flexible API that can easily integrate with *future* software acquisitions.

3 Make the most of free trials.

If the software offers a demo or trial period, max it out. Get your team to use it as much as possible and consider whether it really does lighten the load.

4 Add one solution at a time.

Don't overwhelm yourself or your team with a half-dozen new software solutions at once. Triage them in order of importance and implement one at a time. You may find as you get further down the list that nearly everything you need is already covered.

Managing Change and Obtaining Team Buy-In

Your current teammates may be apprehensive about the new tech and its learning curve. Nick Boscia candidly shares the initial resistance he faced around technology adoption: 'Oh, we have to learn another new piece of technology,' was a common reaction from his team. The key to overcoming this is in communicating the benefits – not just for the firm, but for individual team members.

Do your best to get them excited about it. Remind them of the benefits this solution will add to their own workload. If you can't articulate those, consider whether this is a good solution to add to your tech stack in the first place! Nick explains how he frames it: "I explain how implementing [the new technology or process] will make our lives easier…how if someone wants to take a three-week vacation, for example, they can because someone else on the team could easily pick up where they left off."

Hold training sessions and seminars, preferably led by representatives of the software developer, to prepare them for implementation, and then more sessions after implementation. Give them as much training and acclimation resources as possible to get them comfortable with the software as soon as possible.

Client Experience and Retention

It is up to five times harder and more expensive to acquire a new client or customer than to retain a *current* or *past* client or customer. The more clients you can retain, the more self-sustaining your firm will be.

Client longevity enables you and your team to "get into a groove" where you understand each others' needs and work together seamlessly under conditions of trust. There's less hand-holding, fewer fires to put out, and rarely a situation that your team cannot handle.

For all these reasons and more, client retention should be *among your highest priorities*, if not the highest, if you want to extract your personal time from the running of your firm.

Defining The Ideal Client Experience

How much time have you dedicated to putting yourself in the client's shoes? Many business owners, CPAs included, have spent more time thinking about what it's like to serve their clients than [what it's like to be served](). They think more about what they need from clients vs. what they can *offer* their clients.

Take the time to write down the story of what it's like to be one of your clients. What do they experience? What do they have to do, provide, sign, and contribute. What are the potential pain points and bottlenecks?

Remember, taking things off your plate doesn't mean you should add it to your clients' plate. In fact, your business will be more self-sustaining the easier you make it on your clients.

Think in terms of "eating complexity." What do clients find difficult about working with an accountant? Tracking receipts? Collecting IRS records? Maintaining past years' tax records? Now think – "How much of that complexity could I take on instead of putting it on the shoulders of my clients?"

Productizing Services for Consistency

Many CPAs and other business owners cling to the service model of "customized services." Nothing cookie-cutter – every service plan tailored to the client's needs.

While this may look good on a marketing message, it's nearly impossible to build a self-sustaining firm that way. If you have to design anything from scratch, you will never extricate your own brain from the decision-making tree. You have to give your team repeatable processes to execute.

Especially if you develop a niche, your clients' needs probably aren't that different anyway. Yes, there will be unique aspects to every client, but in general there's a lot of "copy/paste."

Instead of focusing on customization, focus on quality and consistency. Develop several standardized packages with standardized prices and create processes for your team to execute every time someone chooses one "product" or the other.

Creating Educational Resources and Self-Serve Options

For every "pain point" or bottleneck to the customer experience you identified above, consider creating an educational resource — a blog, a guide, a video, something — that you can refer your clients to. Help them understand how to get the most out of your services and how to streamline the process from their end.

You also want to enable your clients to self-serve. Allow them to access things like their previous year's tax return without having to call you. With SmartVault's integrated client portal, clients can securely access their files 24/7 from any device. They can easily upload documents, review records, sign forms electronically, and more on their schedule.

"I tell clients, 'If you ever need last year's return, you can log into the portal and get it yourself instead of waiting for me to send it,'" Kristie Agar of O'Connor and Agar CPA, said about how SmartVault has helped her firm.

"Our clients appreciate how easy SmartVault is to use."

The easier you make it, the less of your own time you will spend on the phone with them — and the less of your team's time you will burn on client hand-holding. SmartVault also has client-facing training material, like 'how to' guides and tutorial videos, to help your clients learn how to use SmartVault quickly.

Proactive Communication and Status Updates

Clients reward communication with loyalty. Get proactive about informing them of progress, advising them on deadlines and requirements, and updating them on status. Much of this can be automated.

Nick Boscia provides an excellent example: "We communicated to all our clients that we're implementing an April 1st deadline. If all your documents are in by April 1st, that gives the team two weeks to get everyone prepared and filed for April 15th." He emphasizes pitching this as beneficial for the client, ensuring they receive the best service from a well-prepared, less-stressed team.

Gathering Feedback and Measuring Satisfaction

Put in place a system of gathering client feedback through surveys and brief questionnaires. Make it as easy as clicking stars and checking boxes. Only by asking your clients will you understand how they experience your brand and what can be done to improve the client experience.

Your Path to a Self-Sustaining Firm

Building a self-sustaining accounting firm is not just a dream—it's an achievable reality. By implementing the strategies outlined in this guide, you can transform your practice from a demanding, time-consuming venture into a well-oiled machine that operates smoothly with minimal hands-on involvement.

Let's recap the key steps to creating your self-sustaining firm:

1 Systematize your operations through process mapping, documentation, and cloud-based tools.

2 Embrace automation to streamline routine tasks and free up valuable time.

3 Build and empower a trusted team, providing them with the tools and authority to excel.

4 Create a consistent, high-quality client experience that fosters long-term retention.

5 Continuously gather feedback and adapt to ensure your firm remains competitive and efficient.

Remember, this journey is not about completely removing yourself from the equation. Rather, it's about giving yourself the freedom to choose how and when you want to be involved. Whether you dream of taking extended vacations, pursuing other passions, or simply having more time to focus on high-level strategy, a self-sustaining firm puts you in control.

The path to this level of freedom and flexibility may seem challenging, but with persistence and the right tools—like SmartVault for secure document management and workflow automation—you can achieve it. Start small, be patient, and celebrate each milestone as you progress towards your goal.

Your future self will thank you for the time and effort invested today. So take that first step, implement these strategies, and watch as your firm transforms into a self-sustaining powerhouse that serves your clients excellently while giving you the lifestyle you've always wanted.

The journey to a self-sustaining firm starts now. Are you ready?

Build a Scalable, Efficient Tax Prep Workflow

From client engagement to sharing and storing final returns, SmartVault addresses all aspects of your tax prep workflow – saving you time, reducing errors, and improving client and staff satisfaction.

Add and Manage Unlimited Clients

Say goodbye to duplicate data entry and account configuration. SmartVault automatically creates client profiles, security permissions, users, and folder structures and integrates your clients' information from Intuit® to SmartVault.

Quickly Engage and Onboard

Create any document and request list you need for effective client engagement and onboarding. Clients can review, submit source docs, and eSign from anywhere, on any device. All documents are automatically saved to the correct folder.

Complete and 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 Review Process

Send clients their returns through the portal, empowering 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.

A Decade-Long History:
This jointly-developed integration enables us to be the only DMS and client portal integrated with Lacerte, ProSeries, ProConnect, and Quickbooks. We are the only solution with direct printing and auto-routing, creating significant efficiency you can't find elsewhere.

Key Benefits of Using SmartVault with Intuit

As the only document management system with a jointly-developed API, SmartVault offers unique advantages that boost efficiency, enhance security, and improve client collaboration. Explore the key benefits of this powerful partnership:

Secure Client Engagement

Enable clients to safely upload documents and eSign forms, while keeping your team and clients informed with automated notifications in a centralized, cloud-based repository.

Efficient Workflow Management

Track tax returns, organizers, and client interactions through an intuitive dashboard, with customizable workflows for annual, one-time, or ad-hoc engagements.

Anytime, Anywhere Access

Improve responsiveness and productivity with 24/7 mobile accessibility to all your documents.

Unlimited Scalability

Grow your practice without limits, leveraging SmartVault's unlimited storage and client capacity.

Uncompromising Security and Compliance

Ensure data privacy and meet industry compliance needs. We're Soc 2 Type 2 Compliant.

SOC 2
ASSURANCE

Learn more and schedule a demo:

www.smartvault.com/intuit

SmartVault is a document management and client portal platform built for accounting professionals.

15 years+
in Business

18,000+
Intuit Users

3 Million+
Global Users

97%
Retention

500 Million+
Docs Stored

Soc 2 Type 2
Compliant