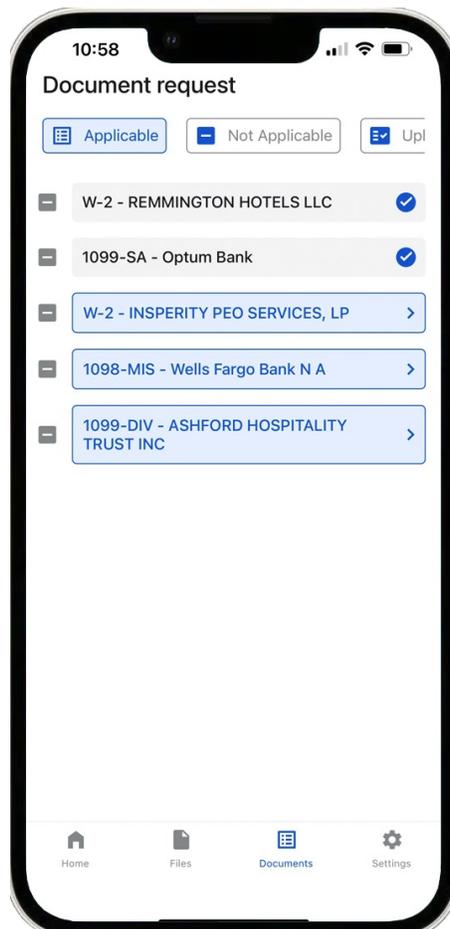
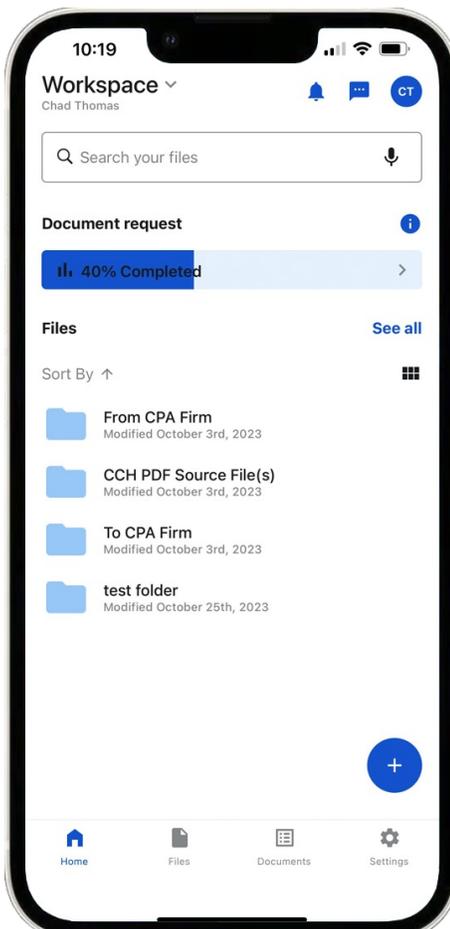


Key Benefits

- Enhanced client experience
- Mobile app with the CPA firm's branding
- Easy document file sharing
- Increase client engagement
- Document classification
- Picture optimization
- Messaging functionality
- Custom document request lists
- Real-time notifications



Does the app support Android and iOS mobile devices?

Yes.

Is there a cost to download the app?

No, the app is free to CPA firm clients.

Is the mobile app secure?

Our SOC 2-compliant mobile app utilizes bank-level encryption and advanced security measures, such as two-factor authentication, to safeguard financial data and personal information.

Is the app accessible year-around?

Absolutely, the firm's clients can use the app to collaborate, message, and provide files to the firm at any time throughout the year.