TaxAct Professional

Client Xchange

Secure, convenient & affordable way to exchange tax documents with clients.
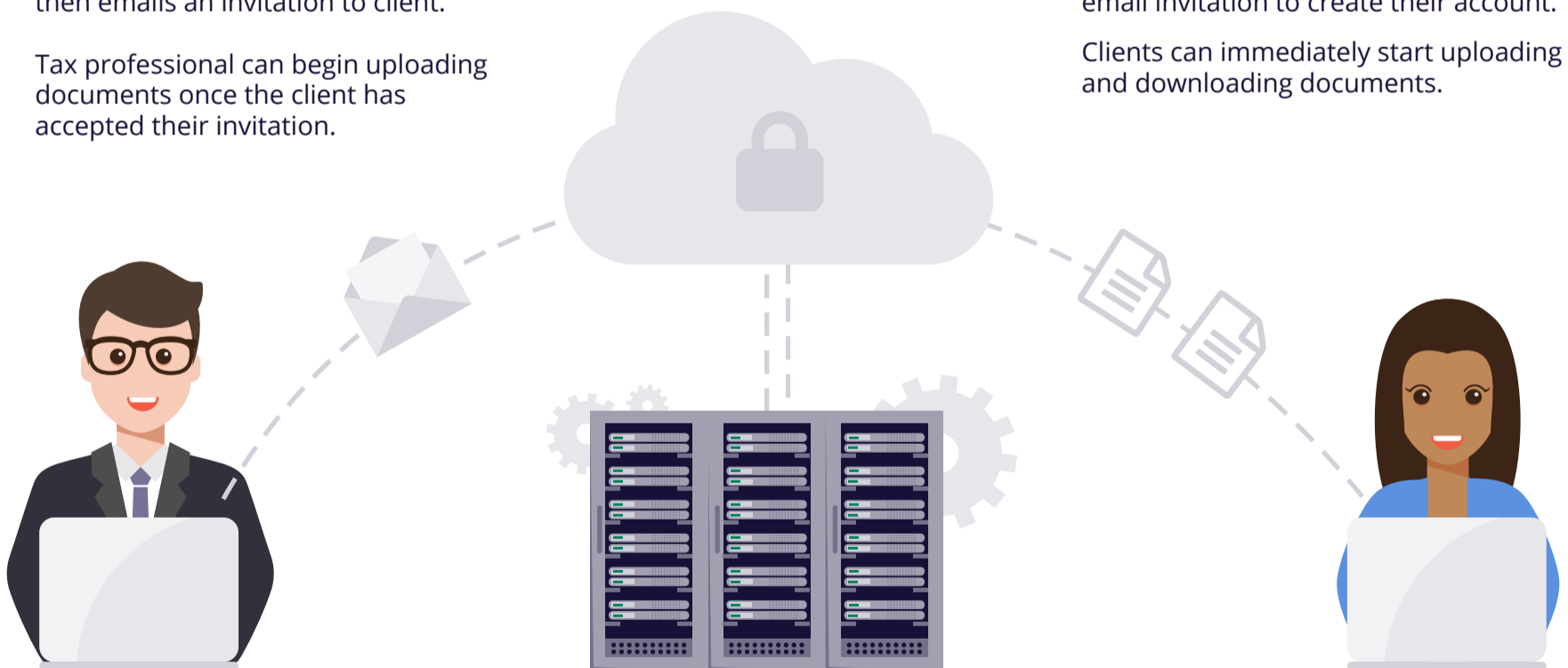
How it works for you:

1 Practice owners send email invitations to grant access.

2 Each tax professional creates their own TaxAct Account.

Practice Owner
Access to *ALL* client files.

Tax Professional 1
Access to *ONLY* her client's files.

Tax Professional 2
Access to *ONLY* his client's files.

- 24/7 secure access via your TaxAct Account.
- Add clients and assign to a tax professional.
- Option to brand with practice name and logo.
- Receive email notification when client uploads files, with option to disable.

How it works for your clients:

1 Tax professional adds client to his account, then emails an invitation to client.

Tax professional can begin uploading documents once the client has accepted their invitation.

2 Client clicks on the unique link in the email invitation to create their account.

Clients can immediately start uploading and downloading documents.

- Recipient gets email when new files are uploaded.
- Data is safely encrypted on TaxAct's secure servers.
- 24/7 secure access via your unique site URL.

Benefits

Security & Peace of Mind
Data is encrypted on secure servers.

Increased Efficiency & Productivity
Get info to & from clients faster.

Save Money & Be Green
Cuts mailing supplies & postage.