

Client Xchange

Secure, convenient & affordable way to exchange tax documents with clients

How It Works for You:





Practice Owner · Access to **ALL** client files



Tax Professional 1 · Access to **ONLY** her 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



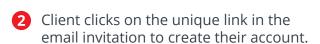
Receive email notification when client uploads files, with option to disable

How It Works for Your Clients:

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.





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