

How we're investing in technology to improve your experience

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5 new technology improvements to look out for

As your trusted advisor, we're committed to providing you with the best possible service — and technology plays a central role in achieving that goal.

In this document, you'll see five key enhancements to the technology we use to facilitate our services and keep you in the loop:

1. New mobile apps for iOS and Android
2. Improved client portal
3. Better document organization
4. Redesigned forms/organizers
5. New ability to pay invoices without logging in

We're dedicated to improving your experience at every point of contact with our firm. These enhancements will make interacting with our firm easier, faster and more intuitive. Let's explore them in more detail.

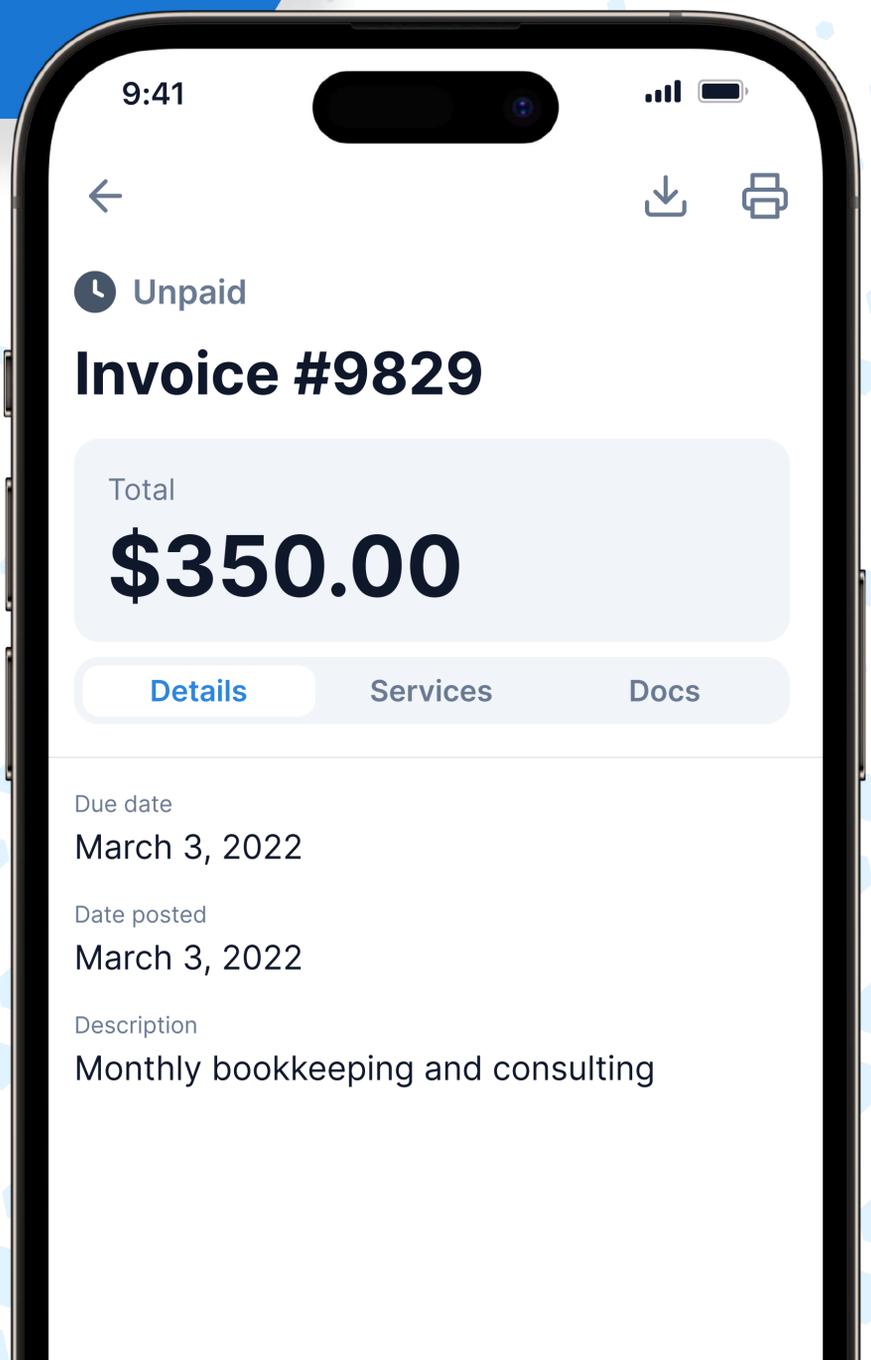
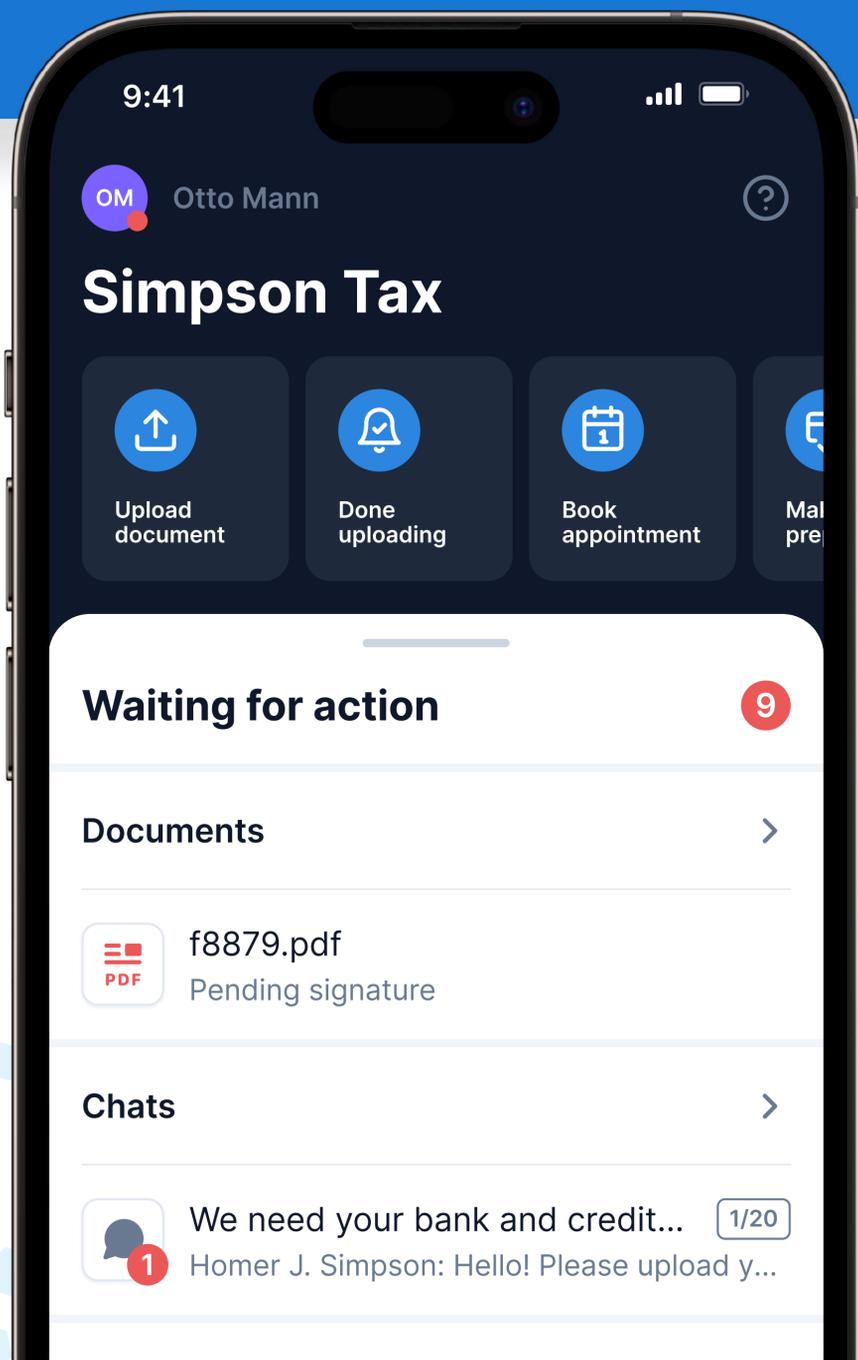
New mobile apps for iOS and Android

You now have access to a brand-new mobile app that will transform the way you interact with us, allowing you to complete key actions and access important information on the go.

If you've previously used our mobile app, it will automatically update for you. If you haven't downloaded it yet, you can find the new app by clicking the links below.



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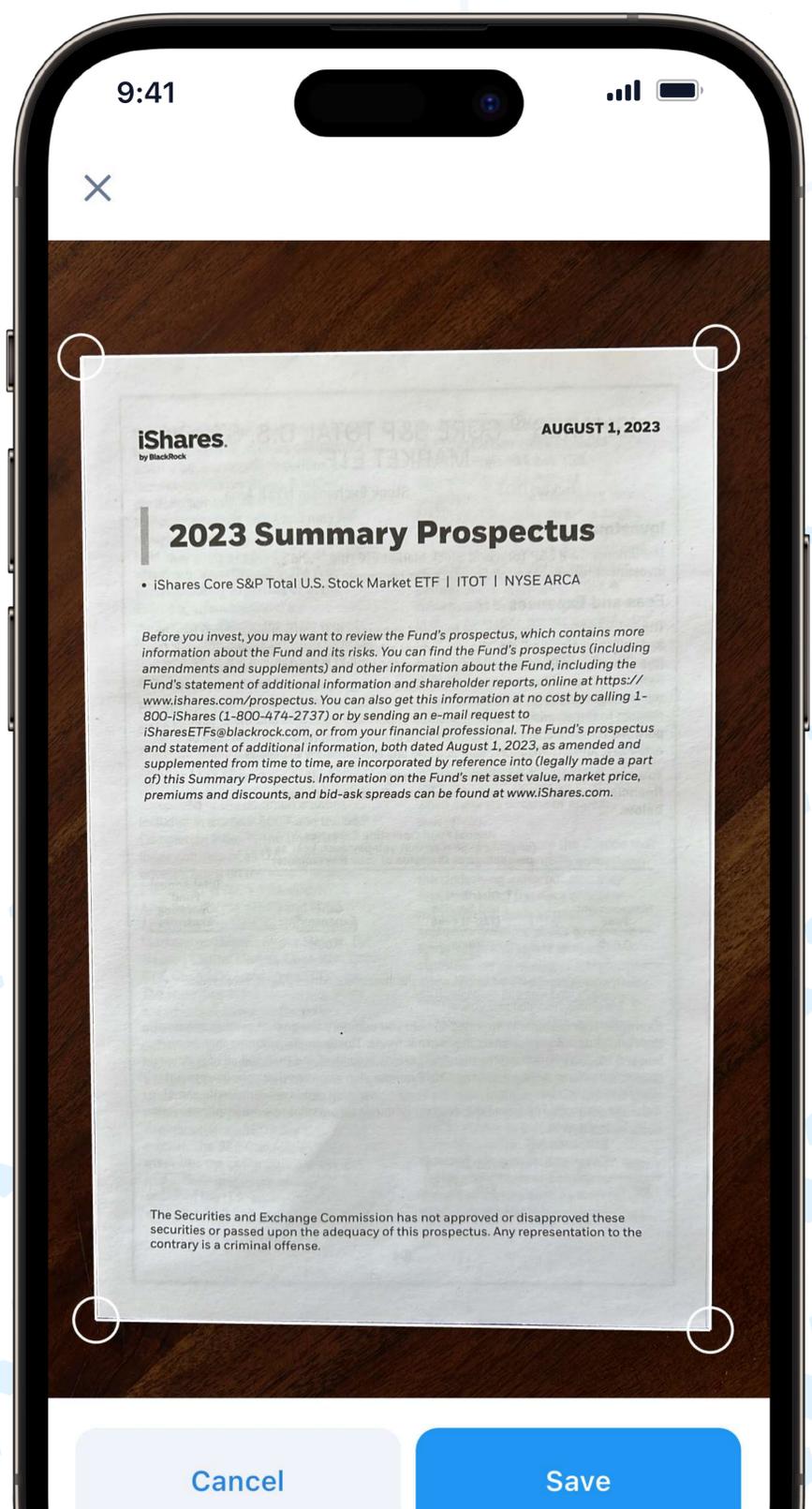
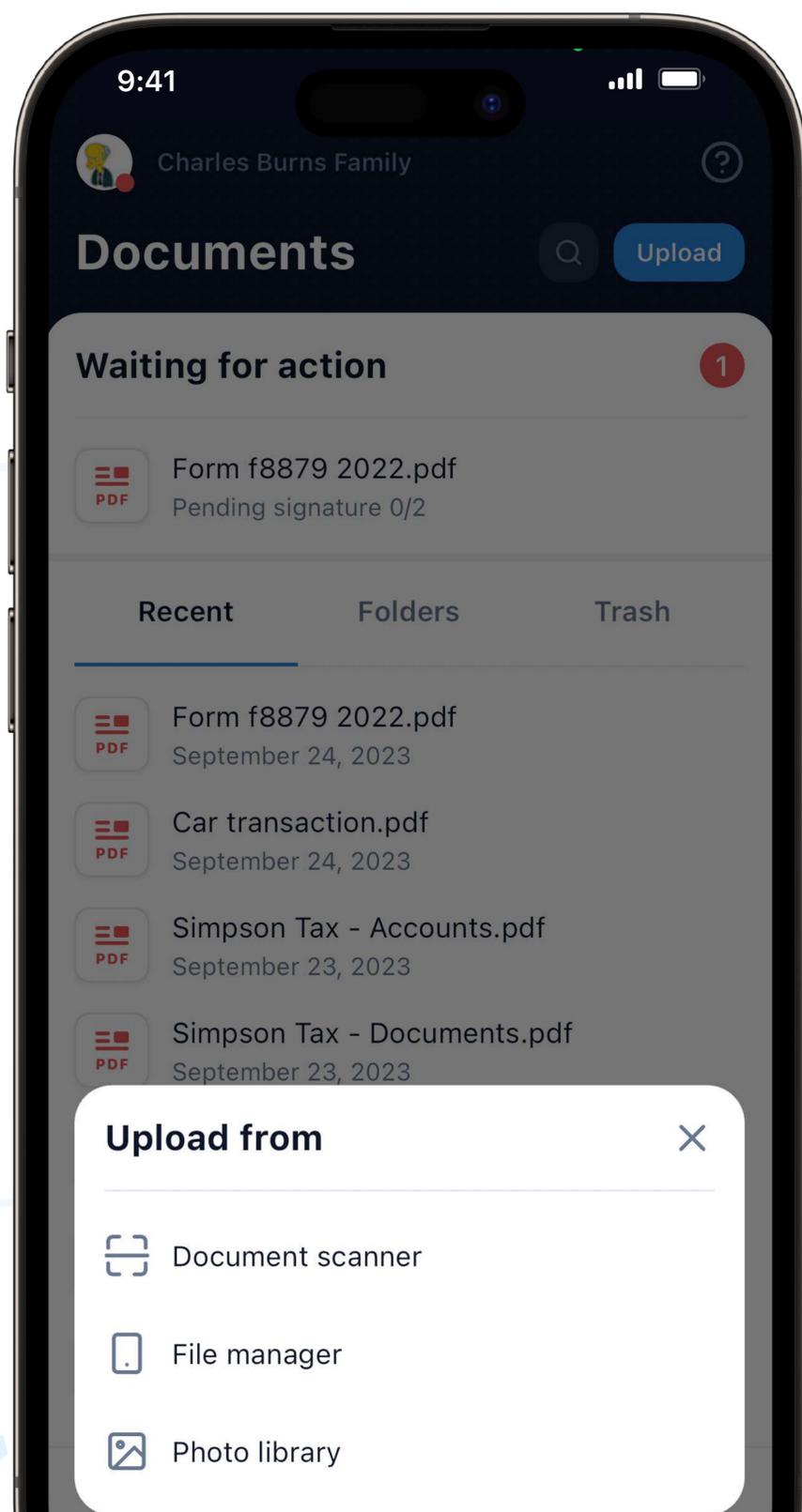


Mobile apps designed with your convenience in mind

The new app is designed with usability and convenience in mind, making it easier than ever to:

- Send and receive messages
- Upload, scan and send documents
- Pay invoices
- Book appointments and more!

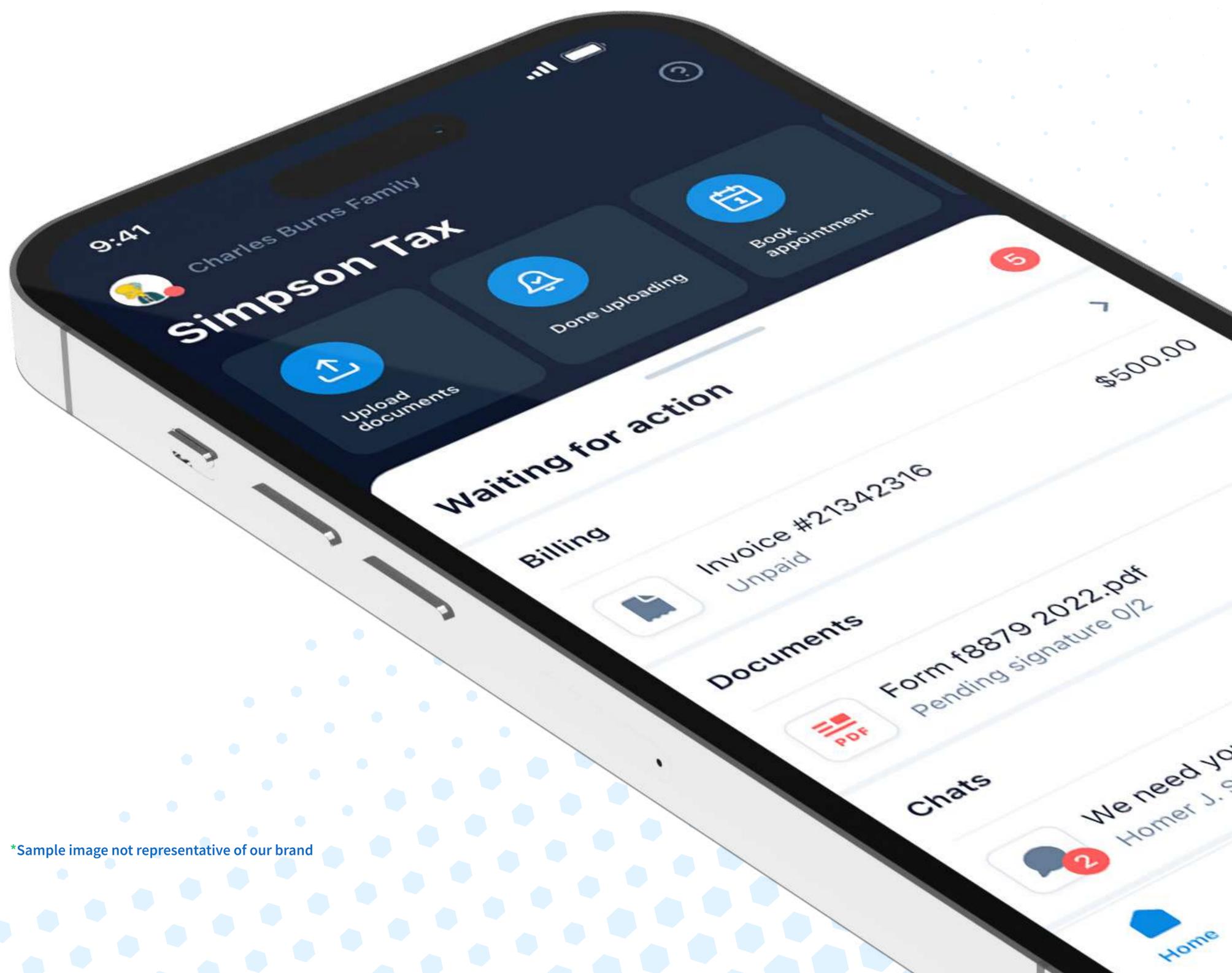
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Clearer, simpler mobile app home page

If we ever need anything from you — whether it's a request for a signature, the completion of a task or payment of an invoice — you'll find it in the "waiting for action" section.

- Newly designed for extra clarity and simplicity
- Bigger buttons for effortless navigation
- Quick actions allow you to perform key tasks with one click

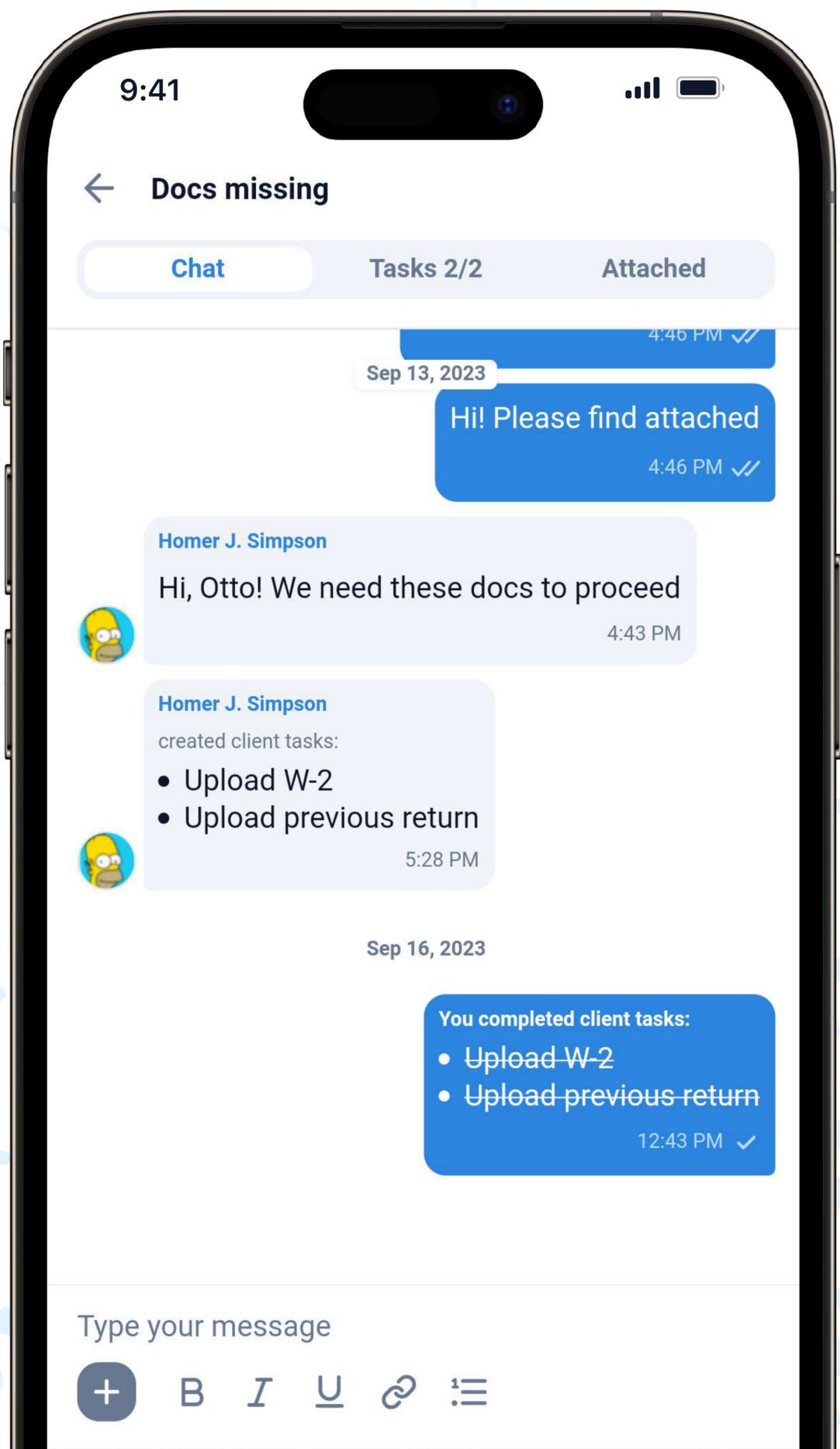


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New chat interface with client tasks and scanner

There's also a new chat interface where you can:

- Ask and answer questions
- View any outstanding tasks
- Easily attach or scan documents



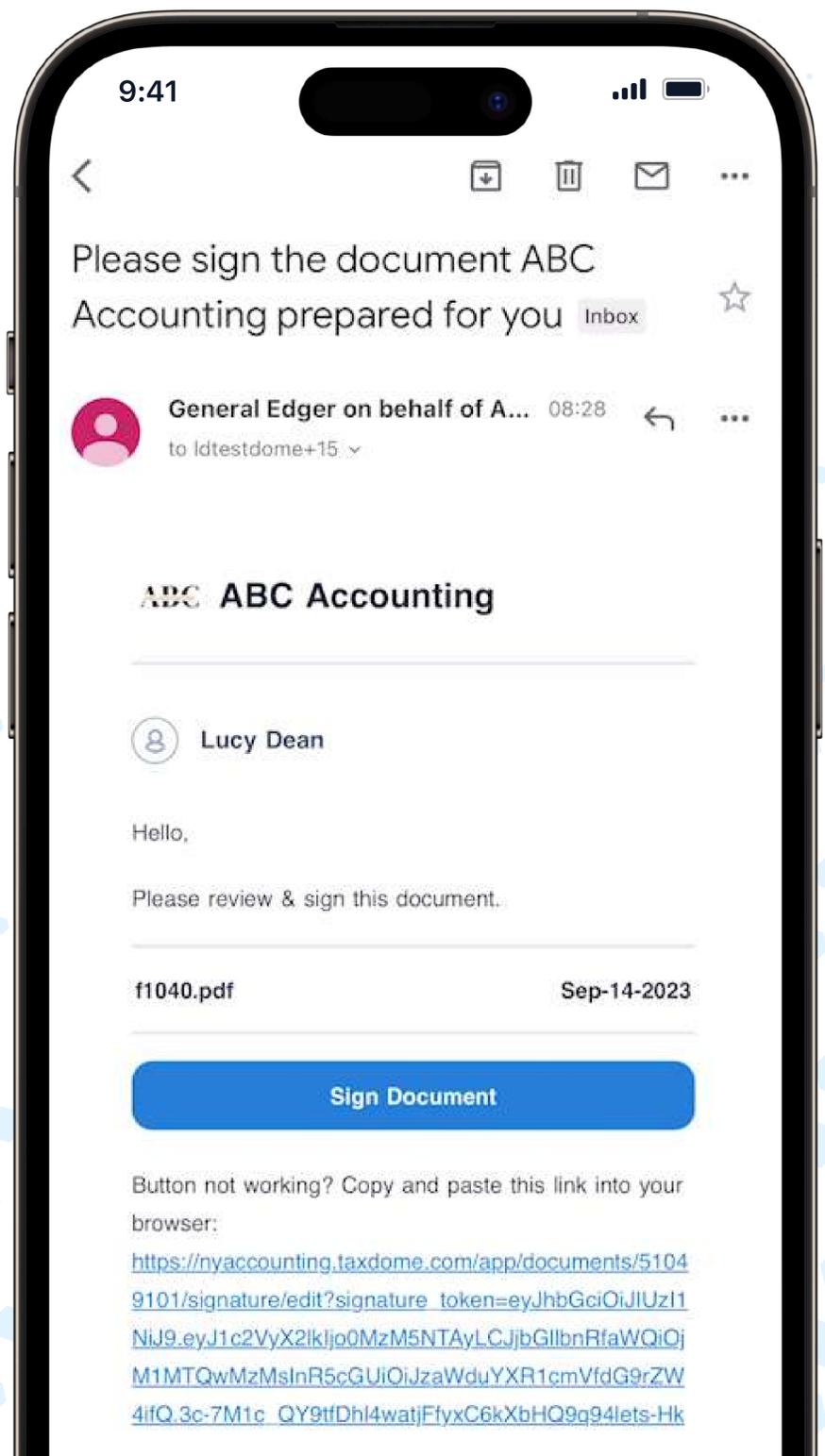
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Links from email and notifications open directly in apps

You'll enjoy a seamless digital experience that links you directly to all the information that you need, streamlines processes and makes your life easier.

- Integration with your email — open a link in your mail app, and it will take you directly to the document in the app
- Push notifications keep you in the loop on all important updates

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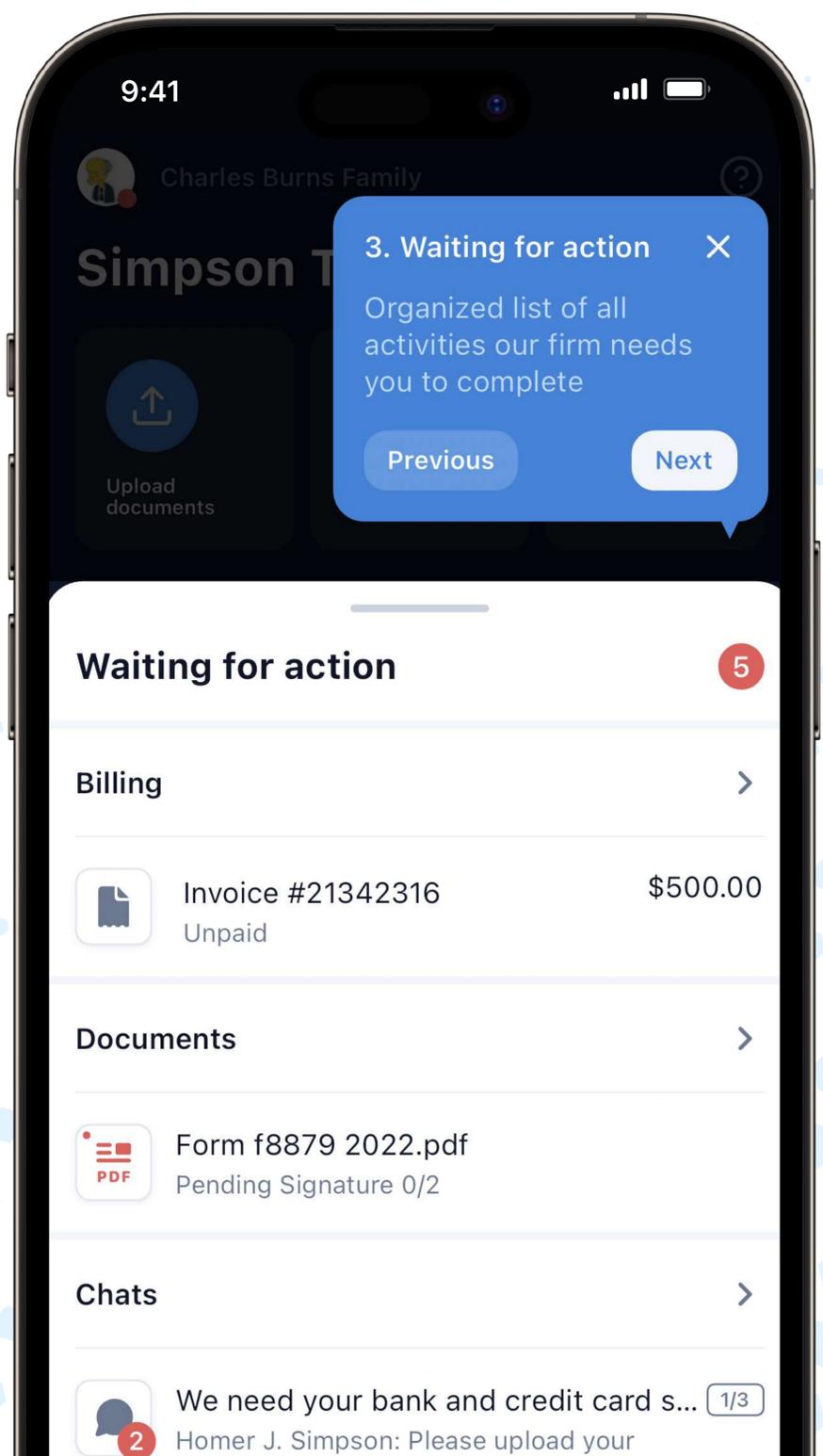
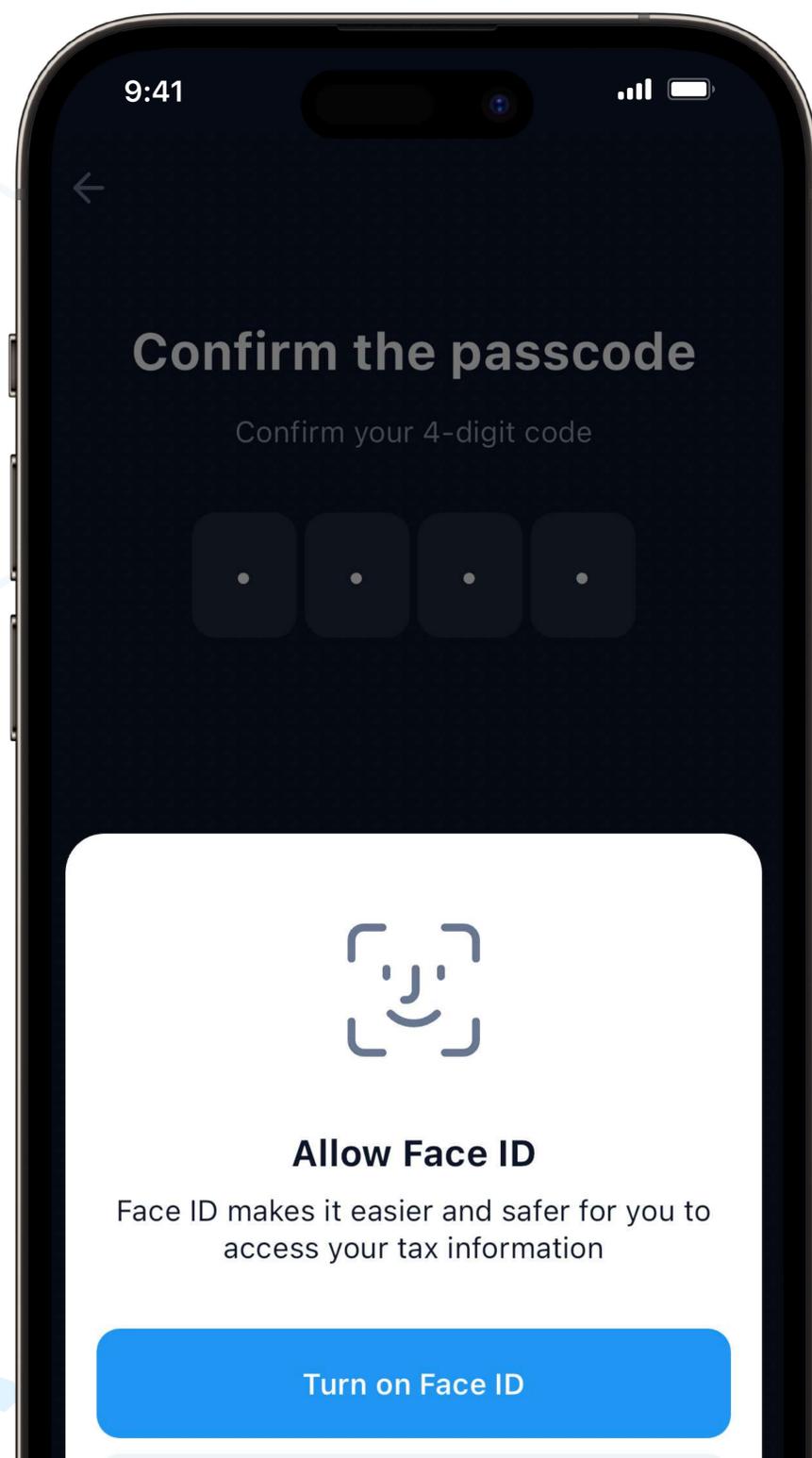


Security and in-app guidance

Your data security is of the utmost importance. Our apps utilize the latest technology and encryption methods.

- The updated mobile apps feature FaceID and TouchID
- You can enable two-factor authentication (2FA) to keep your account safe
- Should you have any questions, there are built-in guides to walk you through how to best utilize the application

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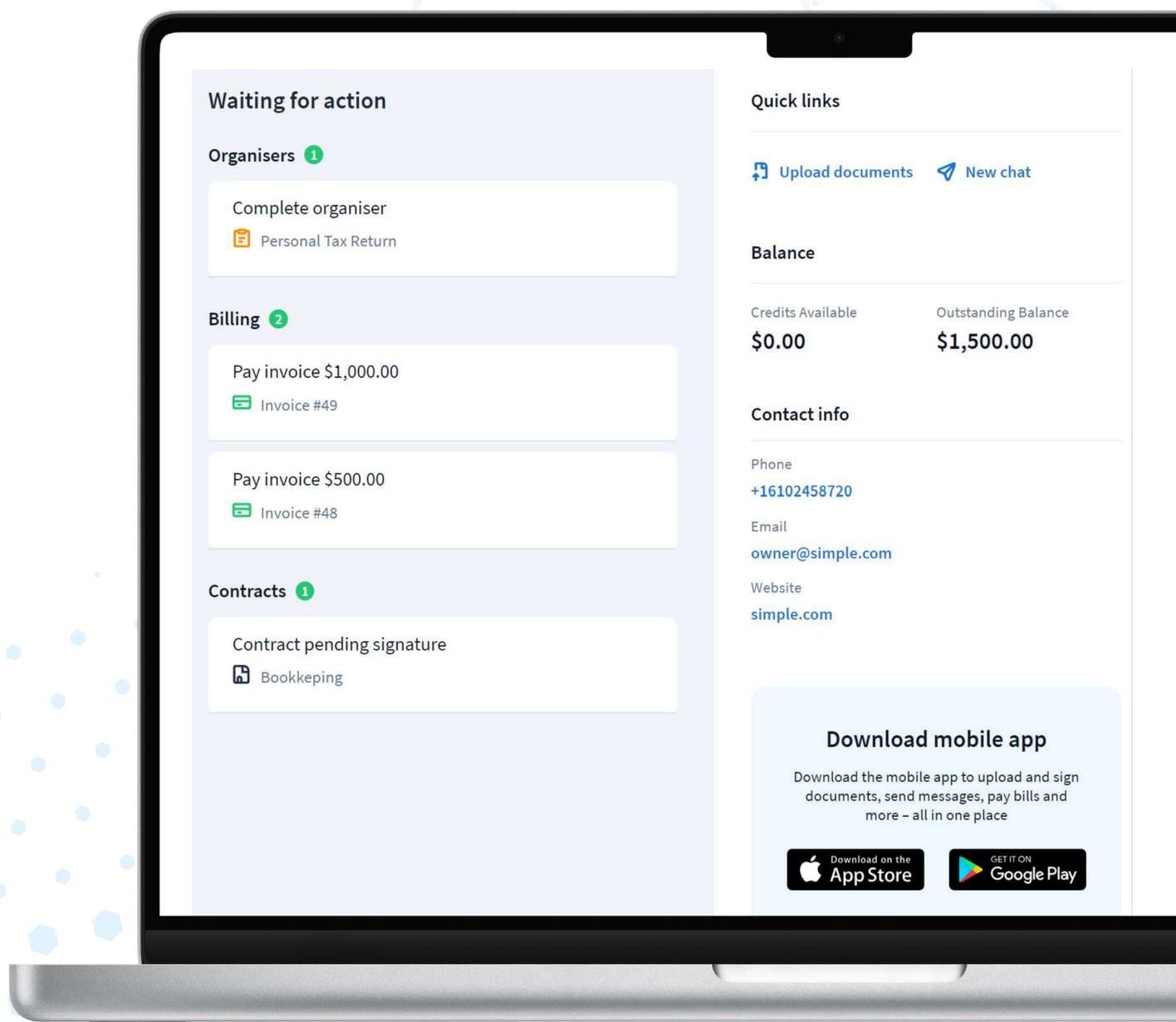


New client portal for web

You'll always know if we need anything from you. Just like the mobile apps, your client portal (web) has been redesigned to provide a complete view of items that need your attention, sorted by category and date. You'll see these items listed under "Waiting for action".

From your secure portal, you can easily see if you need to:

- Pay an invoice
- Complete a task
- View and respond to a chat
- Upload a document
- Complete an organizer
- Review a proposal or engagement letter



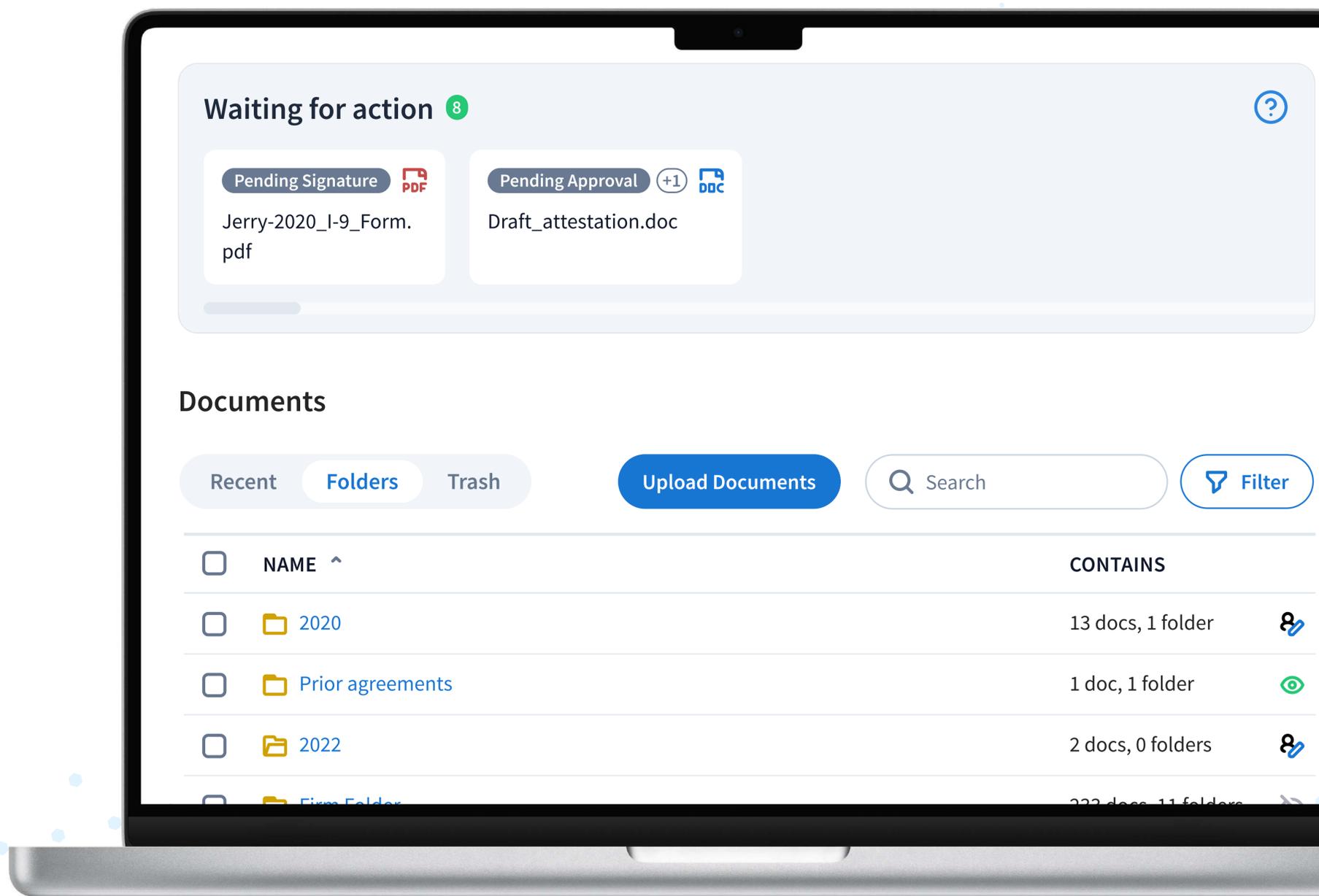
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Better document navigation and organization

The most common reason to navigate the Documents tab is to see the documents we've prepared for you. This area has been organized with three main actions in mind: view recently uploaded documents, upload documents with one click and view documents organized by folder.

- The first tab you see, “Recent” makes it easy for you to view the latest documents we've worked on or uploaded
- The “Folders” tab lets you see the documents organized in a traditional folder structure. We have already organized your folders for you, and when uploading or scanning, you can choose which folders to upload to
- The button to upload documents is clearly visible from all tabs, both on desktop and the mobile app. On the mobile app, you also have the option of using the built-in scanner.

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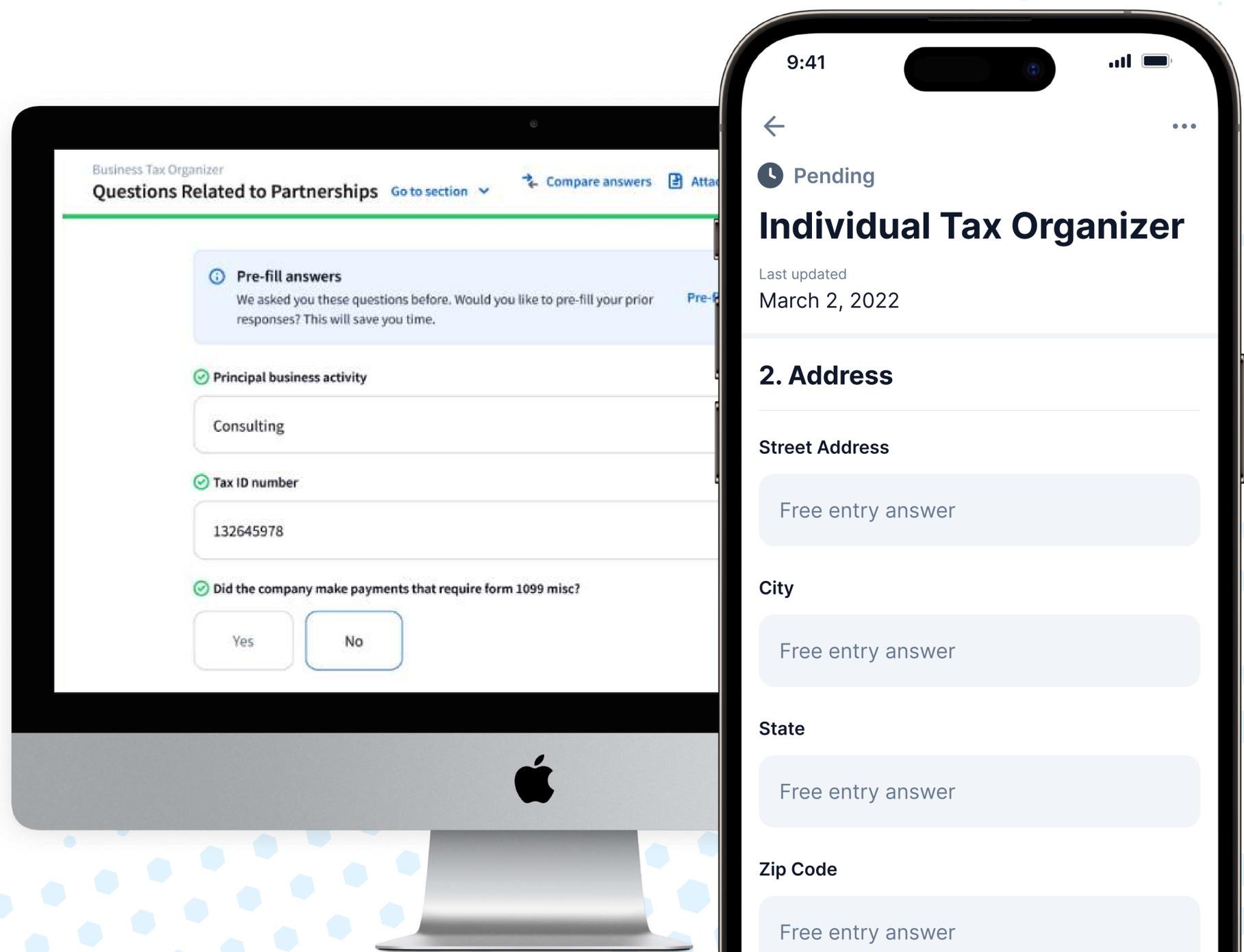


Redesigned forms/organizers

By providing us with organized information, we are better able to provide the excellent service you've come to expect. We've invested in an easy to use form/organizer that is easy to use on both desktop or mobile. This redesign takes into account your experience, first and foremost. Here's a brief overview of how it works:

- Questions will be grouped into organized sections
- Once you complete a section, you'll automatically jump to the next one — no need to click “next”
- A new progress bar will show you how much of the form you've completed
- If you've completed our online organizer before, you can view and compare with previously provided answers
- Keyboard navigation will allow you to complete organizers without using a mouse
- All answers are saved automatically

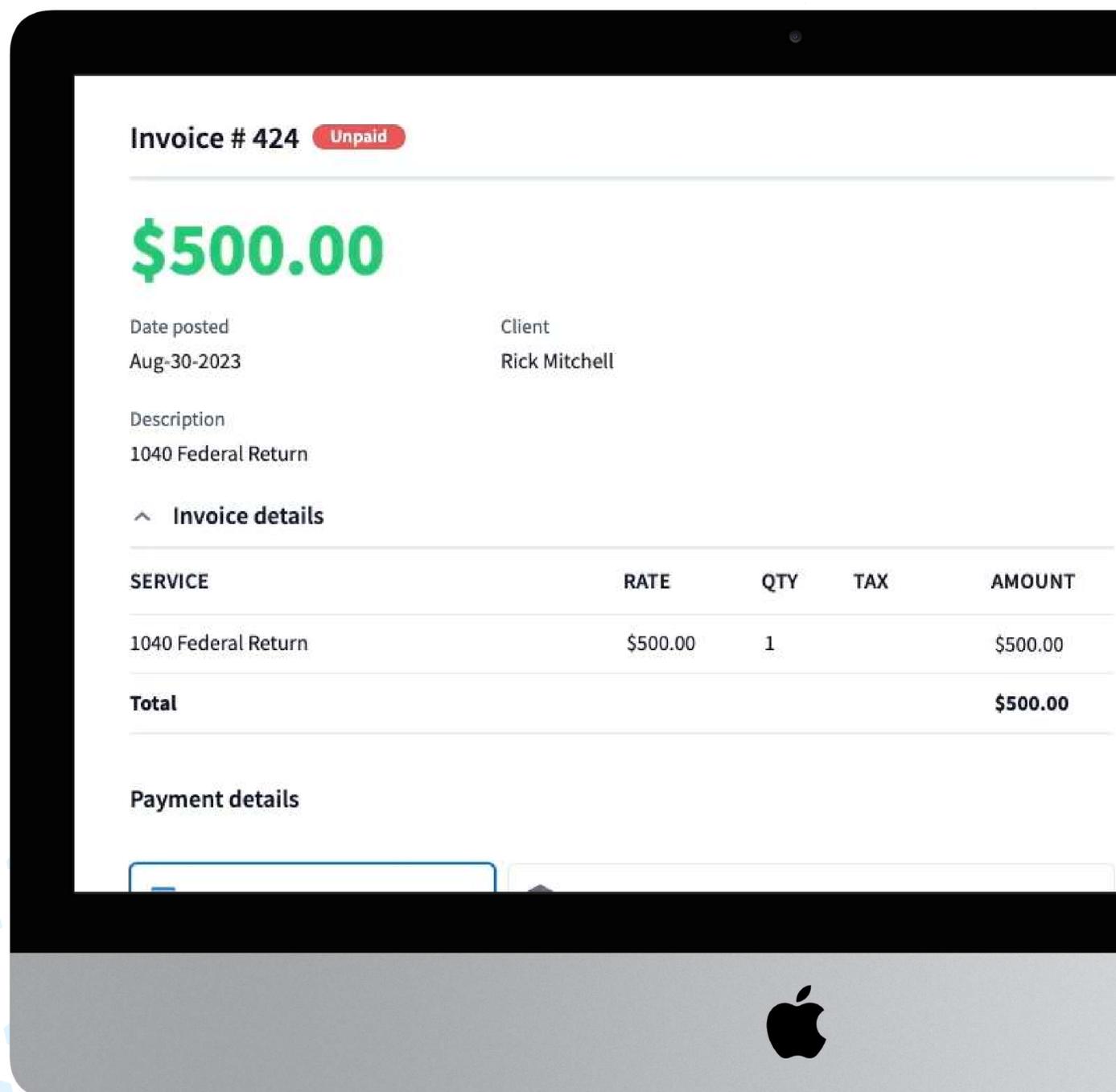
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Pay invoices without logging in

You can now pay invoices directly from an email we send you, without having to log in.

- Click Pay Now, and you'll be taken to the new payments page
- You can send the payment link to anyone who should make the payment on your behalf
- You can save payment details for future 1-click payments (for logged-in users only)
- Revamped invoice page, making it easy to settle multiple outstanding invoices at once



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What you can expect — technology improvements

A superior experience for you

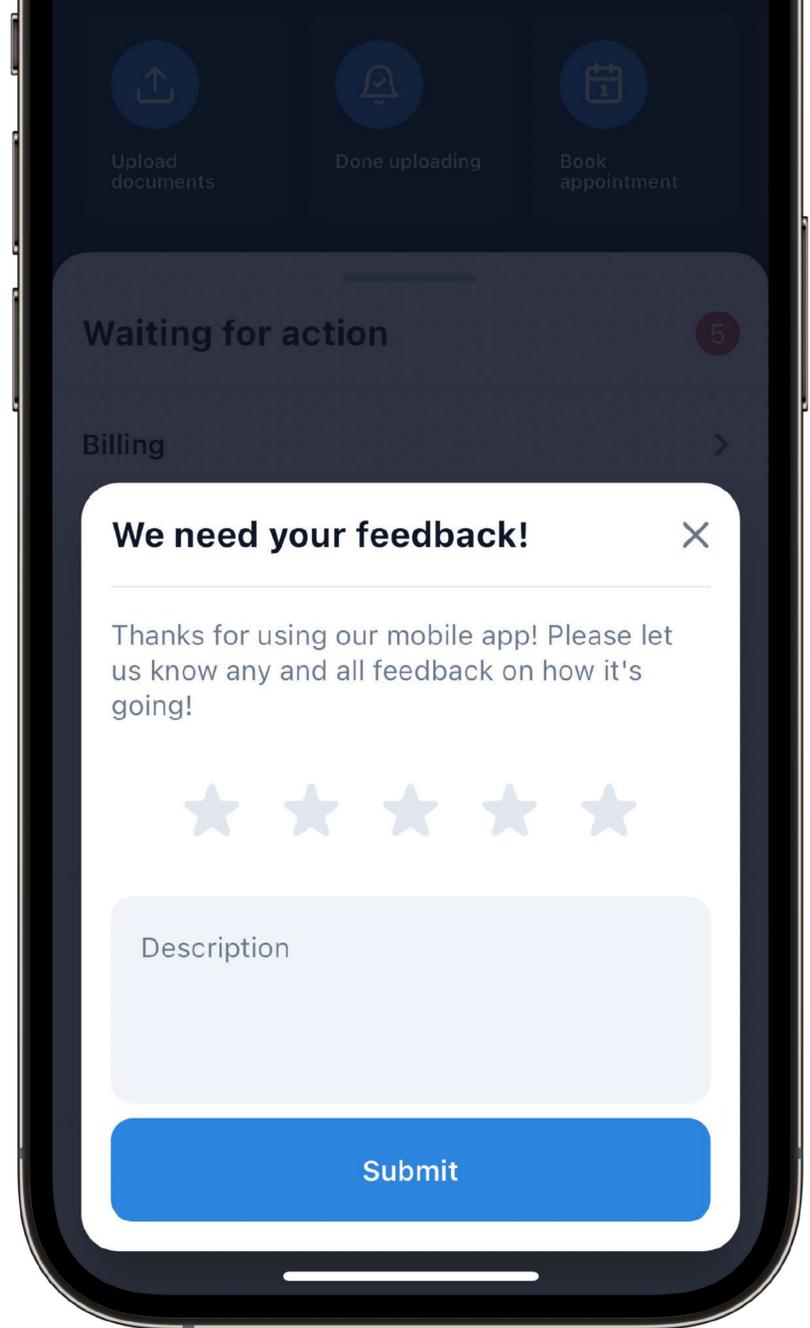
Together, these enhancements mean one thing: a superior experience for you.

You'll be able to:

- Access information faster
- Interact with our firm easily on any device
- Action items with one click
- Be kept in the loop at all times

This is part of our ongoing commitment to provide you with the best possible client experience. Going forward, you can expect continued improvements to our service and the technology we use to interact with you.

And - we're always looking to improve. If you have any suggestions for how we can make your experience better, provide feedback directly to our technology team in the mobile application. To leave feedback, click (?) and select 'Rate this app'.



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