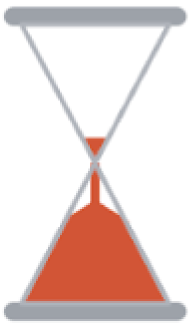
Shoebox

You didn't build a tax practice to chase documents

Client intake involves coordination your team is doing manually. Here's what that costs.



30+ min per client, drained on coordination

- Build checklist from scratch
- Send weekly reminder emails
- Track what's still missing

WITH SHOEBOX – THESE RUN AUTOMATICALLY TO IMPROVE YOUR EXPERIENCE & SAVE TIME

- Checklist auto-built from prior year
- Reminders sent automatically
- Missing docs tracked in real time

Better client experience
Clients know exactly what to upload – no confusion

Earlier submissions
Specific requests get documents in faster

Less staff frustration
Your team stops being the follow-up machine

How do you value your time?

Curious what this looks like for your firm?

Book a 20-minute walkthrough

Works alongside Drake, Lacerte, UltraTax, ProSeries, and other tax-prep platforms. Shoebox is a coordination layer, not a replacement for your existing tools.

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