What is SmartVault and who would benefit from using it?

SmartVault is the digital platform that the tax department uses to store and transfer documents. We use it in-office as a digital filing system, as we scan all of your paperwork right into your vault. It cuts down on paper files tremendously and puts the information we need literally at our fingertips! **To our current Financial Advisory Clients:** Please note that SmartVault is not the same as the Advyzon client portal, which is used on the financial side of the business. These are two different applications; each designed specifically for the needs of the business it supports.

How do you know if SmartVault is appropriate for you? If you know how to scan and upload documents, label and save them as a .pdf, then you can easily navigate the SmartVault system.

Why would you *want* to do this? By using SmartVault, you and your documents never have to leave your home. All of your tax documents can be scanned and uploaded directly into your vault, and when your returns are complete, we can send them back to you through your vault. All signing can be done digitally as well. However, if you prefer having a paper copy of your tax returns, we can use your digital uploads to complete your returns and then provide you with hard copies in a snazzy blue folder. Sending us your documents digitally *does not* mean that you also have to receive your tax returns digitally, that's just an option. SmartVault is very versatile!

Speaking of versatility, SmartVault is a year-round platform. You can upload your information as you get it through the year; you do not have to wait until tax season and send us everything at once. SmartVault is a great way to stay organized, it saves time, travel and postage and with the option of year-round uploading at your convenience, it also cuts down on (some) tax season stress! If you upload your documents through SmartVault on your iPhone or iPad, scanning documents is as easy as taking a pic, and it will automatically save as a .pdf!

How do you know if SmartVault is NOT appropriate for you? If the thought of scanning, naming and saving documents in .pdf format is daunting to wrap your head around, then SmartVault may not be for you. And if we are being honest, under those circumstances, it would not be the best option for us either. We are always here to help, but if we must take the time to clean up improperly labeled files or illegible uploads, then it creates more time-consuming work on our end.

We understand that not everyone is comfortable with this type of service, and those clients can rest assured that providing us with your paperwork via mail (with tracking) or drop off will always be a welcomed option. **** Please note that we can no longer accept information via email or text.**** We require that you provide us with your paper documents or use the SmartVault platform.

If you are interested in learning a little more about the SmartVault system, you can check out a short video here:
https://vimeo.com/493784146