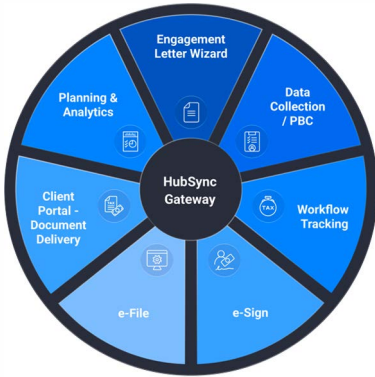


It's "Onboard & Gather" Time Again



As you know, HubSync has a lot to offer to help firms automate your firm.

Everything from kicking off engagements with our award-winning Engagement Letter Wizard, to breaking up and delivering the tax return for your clients to sign.

As you gear up for busy season this year, think about ways to make the onboarding of clients and the gathering of source documents easier, faster and automated.

HubSync offers various automated solutions, but this letter is focused on the timely modules to make this year what you've always envisioned it could be!



Onboard and Gather

- ⚡ Engagement Letter Wizard
- ⚡ Client Master Data
- ⚡ Tax Organizer
- ⚡ Client PBC

Best way to get started?

Start with "Onboard & Gather" solutions:

1

⚡ Engagement Letter Wizard

Our award winning ELW tool allows firms to create, route, deliver and track thousands of engagement letters, or any type of document, with just a few clicks.

If you are sending 10,000 letters or more, your savings are in the millions.

2

⚡ Tax Organizer

Our proprietary Organizer offers a smooth, digital and unique client experience.

For the firm, it also offers 1-click Integration with tax software and automatically generates a list of documents from prior year return data for 1 or 1,000's of individual tax clients at a time.

3

⚡ Prepared By Client

HubSync's PBC solution collects & gathers information, amounts and documents all in one place, with the ability to collaborate with team members as well as internal/external parties.

Further, firms can configure a variety of custom templates across service lines and utilize bulk delivery.

Got 15 min? Let's see if we can help you this tax season:

Schedule a chat