

# WHAT TYPE OF PORTAL IS RIGHT FOR YOUR FIRM?

See the difference between adopting an integrated portal solution versus third-party options.



**THIRD-PARTY SOLUTION** // While third-party options are quicker and more secure compared to paper, they don't seamlessly integrate with firms' tax software and can create a clunky and less secure experience.



Complete Return



Create PDF



Open Third-Party Software



Find Correct Client Account



Upload PDF to Portal



Delete PDF from Local / Network Location



Relax or Move on to the Next Project

For new clients, do you need to manually create the client account?

Do you worry about the potential human error and security risk of filing the return to the wrong portal?



**NETCLIENT CS®** // A step up from third-party portals is an integrated solution that works seamlessly with your current tax software, like UltraTax CS®, for example. This integration nearly eliminates all of the extra steps that are required when using paper or a third-party solution.



Complete Return



Relax or Move on to the Next Project



Deliver to Client via Portal



Streamline even more with online bill pay and 8879 e-signatures!