

WELCOME TO THOMSON REUTERS TAX & ACCOUNTING CANADA



THOMSON REUTERS



MESSAGE FROM ÉRIC NEVEU

Like any great enterprise, your practice is far greater than the sum of its parts. No one activity defines the value and service that you bring to your clients.

The same is true of the DT Professional Suite. Each component part of the Suite acting alone is a powerful tool but put together, these integrated parts have even greater potential to streamline workflow and increase profitability.

Through collaboration, innovation and integration, the DT Professional Suite gives you more time to focus on what matters most in your business.

This catalogue showcases the many products and services that together make up the powerful DT Professional Suite. I hope you will use it as your roadmap to a more efficient and profitable practice.

ÉRIC NEVEU

SENIOR DIRECTOR, PROFESSIONAL &
CONSUMER SOFTWARE & SERVICES, CANADA
THOMSON REUTERS DT TAX AND ACCOUNTING
(CANADA)



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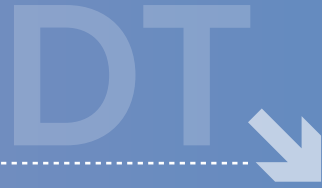
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THE DT PROFESSIONAL SUITE



Professional Suite

{ DT Professional Suite }

The DT Professional Suite is designed for tax preparation professionals who want to ensure that their firm's workflow is both efficient and secure. It creates a seamless flow from the client to the firm and back - saving time, money and helping project a tech-savvy firm image that can help to grow business and provide a higher level of client service.

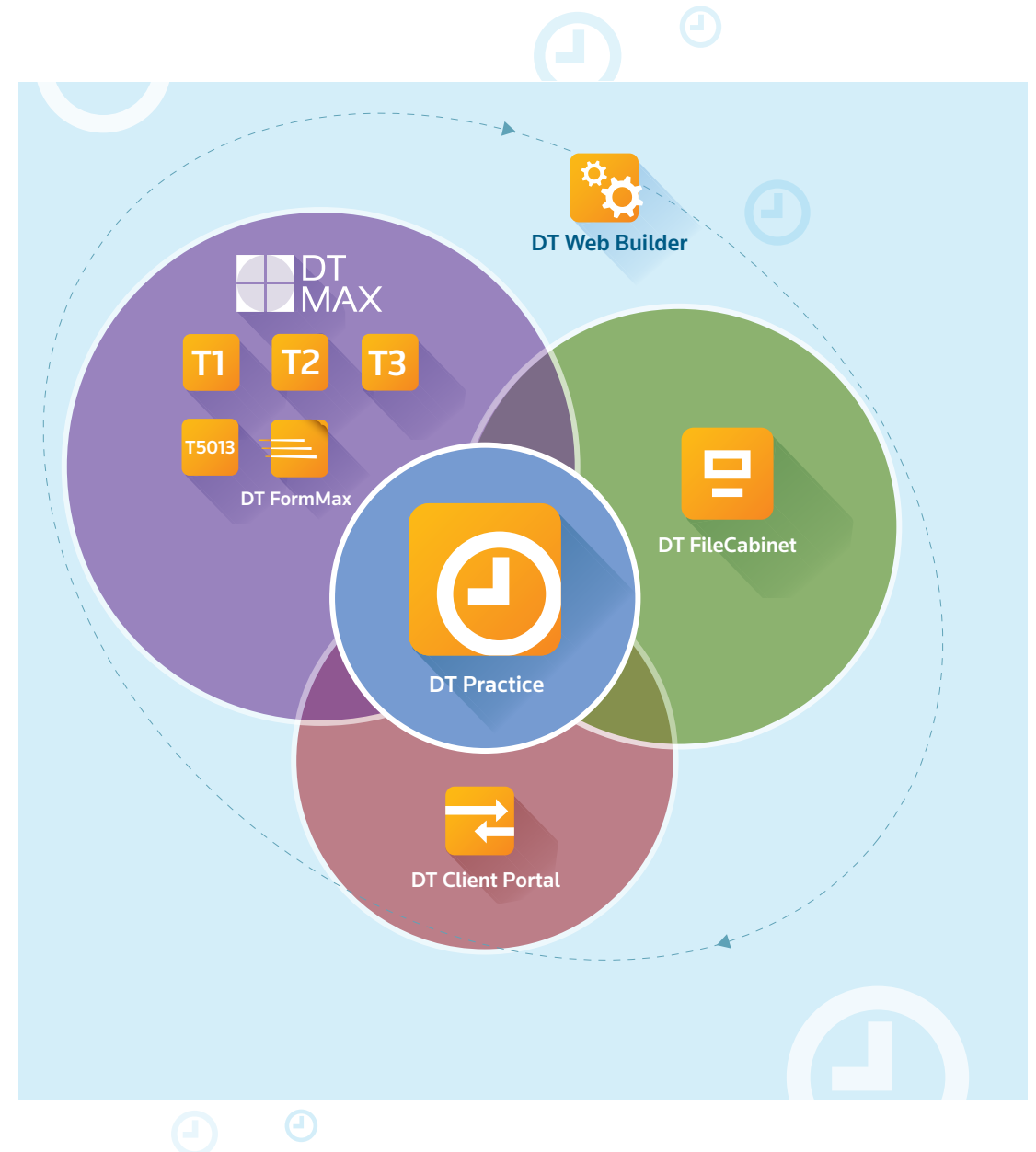
At the hub of the DT Professional Suite is DT Practice, the powerful accounting practice management software, designed to meet the needs of today's tax and accounting professionals.

DT Max compliance products for personal, corporate, trust and partnership returns are key components of any tax practice.

These products are fully integrated with DT FileCabinet, a sophisticated digital document management system that saves paper and puts documents and files of any kind at your fingertips.

Documents in DT FileCabinet can be placed within reach using DT Client Portal, a private, secure online lockbox that allows for instant transfer of files between your firm and your client and between your client and your firm. Integration of Client Portals is easy using DT Web Builder, which creates and hosts affordable, customized websites for tax and accounting professionals.

Discover what makes the DT Professional Suite from Thomson Reuters the most comprehensive suite of productivity tools for tax professionals in Canada.



DT Practice is the hub of the DT Professional Suite. This powerful accounting practice management software is a comprehensive system, designed to meet the needs of today's tax and accounting professionals. It is a proven product that offers much more than standard time and billing; it will help you bring your entire practice to new heights of productivity with real-time access to critical firm, staff, and client information.

Award-winning practice management

The DT Professional Suite now offers the Canadian tax and accounting community the proven power and reliability of Practice CS, which is part of Thomson Reuters' CS Professional Suite of products, used by thousands of firms across the United States. While core functionality has remained the same, DT Practice has been customized for the Canadian market and integrates with other products in the DT Professional Suite.

DT Practice redefines practice management software, enabling you to:

- Streamline your entire workflow process.
- Serve clients more efficiently and effectively.
- Achieve maximum productivity and profitability.



Big-picture perspective

Setting a new standard for practice management systems, DT Practice offers a unique big-picture perspective that provides valuable insight into your business, guarantees unprecedented client service, and ensures that your firm runs at peak productivity.

The latest technologies

By combining state-of-the-art technology (including Microsoft .Net and SQL Server, seamless integration with Microsoft® Outlook®, paperless processing, and web-based tools) with firm management modules (including Project Management, Client Management, and Staff Management), DT Practice offers insight, convenience, and workflow efficiency that will save you time and money.

Dashboards for efficiency

Offering firm, staff, and client dashboards with real-time functionality, this accounting management software serves as a central hub, where you can get up-to-the-second data on firm operations, staff projects, and client status—all in one place. With this knowledge, you can confidently make critical operational and financial decisions based on key performance indicators.

DT PRACTICE MOBILE

On-the-go-access to your firm data on your iPhone®, iPad®, and Android™ device



Manage your firm from anywhere. DT Practice Mobile is an app for your mobile device that lets you access the key indicators you use to make decisions and run your practice every day. It's the easy option to get important firm information on your Apple® iPhone, iPad, iPod touch®, or Android™ device.

Exclusively for tax and accounting professionals – the DT Practice mobile app gives you on-the-go access to important firm, staff, and client data 24/7, from anywhere. The information automatically flows directly into DT Practice where you can view it and other important DT Practice data to help you make smart business decisions on the spot. Stay connected and in control of your bottom line with key features, such as:

- Staff Availability
- Firm Financials
- Staff Active Timers
- Time Recap, assigned Projects and Tasks, and Notifications
- Kilometre Tracking
- Receipt Tracking
- Call Timer



George Hiotis

Quality Assurance - Manager

As head of our Quality Assurance team, I am responsible for putting in place the systems required for testing all DT Max compliance products.

My team is comprised of experienced support representatives who have shown a keen interest in tax and in our products. More importantly perhaps, they have demonstrated a keen eye for detail.

Coming from the Support Team, these testers know that thorough testing delivers the accuracy and integrity our DT Max clients expect.

DT Compliance products

Professional Suite

{ DT Compliance products }



DT Max compliance software offers tax professionals T1 (personal), T2 (corporate), T3 (trust) and T5013 (partnership) software of the highest quality. All four products use the same powerful platform containing with a wide array of powerful productivity features in common. All four include error prevention and authoritative diagnostics.



The installation of DT Max compliance product, T1, T2 and T3, provides users with the current and the prior 9 years of tax calculations. That means you never have to reinstall a prior year's software ever again!



Efficiency and accuracy are the hallmarks of DT Max, the only professional tax software that uses single screen data entry and allows simultaneous viewing of the prior year's data input or data from any other data set (including that of other clients).



In short, data input is quick and accurate. Results are viewed in context and can be traced back to their origins from field to form to worksheet to data entry.



The powerful QuickTrack feature also allows for validation of each field by entry. Senior staff can refuse, question or approve any field and apply notes for preparers.



The Client List provided in every DT Max product is a quick reference to the current status of any tax file. The Client List displays if a client's data has been received, if the return is ready to file or if it has been efiled, and shows a myriad of other statuses in between that are tracked every step of the way.



The status tracking in the DT Max client list may be analyzed at any time to understand work flow and to alert administrators of files that may need immediate attention.



The Client List is customizable and can provide client information such as telephone numbers, SIN numbers and email addresses. It also enables a label printing tool which allows for the printing of any set of key information including full addresses.



The Audit Trail, also included in every DT Max compliance product, is a history of all activity in any client file or the entire database which logs the user who applied changes and at what time.



Printing of tax returns can be reduced with a single keystroke to avoid extra pages and wasted paper.



Electronic filing with DT Max is virtually error-free and can be traced back to the client's file and reported as the client's status in the Client List.



Comprehensive database conversions are available for all competing products.

Connecting two great products: DT Max T1 & Taxnet Pro

DT Max T1 customers can link directly to supporting information available on Taxnet Pro, the Canadian premier online tax service from Carswell, a Thomson Reuters business. This takes you where you want to go for precise supporting information that applies to any of your tax questions.

Taxnet Pro combines an intuitive interface and state-of-the-art technology to deliver relevant tax information and authoritative commentary.

Thomson Reuters, bringing you two powerful products together to deliver the ease-of-use and efficiency you need for your tax business.

 **Call 1 866 609-5811**
or visit www.gettaxnetpro.com



Maurice Sandri

Director, Professional & Consumer Software Development

Innovation is an imperative for any developer.

It comes when talented developers listen to customer feedback and exchange ideas, always keeping in mind the need to respond to the changes required by our vital partnership with the CRA and RQ.

Our focus is on developing new and powerful functionalities that are simple to use.

Your clients rely on your expertise to ensure that they are paying the least amount of tax and that you have a clear understanding of the tax implications of choices made on their tax return from year to year. Can you rely on your tax software to always be on top of changes coming out of Ottawa and your provincial legislature? DT Max T1 customers can.

DT Max T1 is a leader in personal tax reduction. Our T1 team is dedicated to ensuring the optimal use of deductions and credits and, through accurate calculation of deductions and their optimal transfer to family members, can save your clients hundreds if not thousands of dollars annually.

DT Max is also at the top of its class in more complex calculations such as income from multiple jurisdictions, foreign income and bankruptcies.



DT Max users have confidence that, while the data input may seem basic, the calculations applied are the most advanced in the industry.

T1-Adjustments are a perennial inconvenience for tax preparation specialists. DT Max makes T1-ADJs easy to prepare and provides a clear and concise comparison of results that you can show your client – while maintaining a copy of the tax return as originally filed.

Preparing a customized Client Letter with extensive detail and instructions for your client is fully automated with DT Max. The Client Letter, bearing your logo, can be edited by you or replaced entirely with new text and may be sent to a separate printer.

Automate your billing with the DT Max T1 Billing Module. Many firms bill according to the time spent on a file but if you prefer to bill according to the complexity of the tax return, the DT Max Billing Module can fully automate the production of an invoice based on your criteria.

Only DT Max offers a Tax Planner that is released in June and contains any budget changes for the current year known at that time.

The DT Max Planner is fully integrated into DT Max T1 and contains 6 planning scenarios that are completely separated from the amounts entered into any tax return future or present. That said, any of the six plans created or any portion of them may be imported into the upcoming tax year saving time and avoiding errors.

DT Max has always had an excellent reputation for clean EFILE returns thanks to thorough testing and powerful error-preventing diagnostics. DT Max customers also appreciate the way DT Max writes the EFILE status of the client into the client's file and the Client List.

Tax Data Download from RQ and for 2014, the CRA to save time and errors.

Our development team worked closely with Revenu Quebec and DT Max TP1 was the first to download Relevé data from RQ. Our team is currently working with CRA to make their long-anticipated data delivery service ready to use for tax year 2014.



Sylvain Lacelle

T1 Product Manager

Being responsible for the development of the DT Max T1 software, one of my biggest challenges is to coordinate and update the many tax calculations coming from the CRA and RQ.

Responding to clients' needs and suggestions and maintaining a high level of optimization are, of course, high on my list of priorities.

When I was hired by Dr Tax 20 years ago, I would never have thought that my passion for tax and innovation would lead me to a long career in this field.

No other corporate tax software is more responsive to the needs of the busy tax professional than DT Max T2.

DT Max T2 provides seamless integration of the related and/or associated corporations in 3 easy clicks. With DT Max T2 you can automatically import the tax information of a client corporation's related party through the introduction of the other company's client number.

Once the automatic data import has been completed for all corporations, DT Max's data entry screen enables you to view all the imported files for the filing corporation. DT Max will also notify you of any discrepancies between the imported files and the actual tax return.

DT Max's unique verification system ensures that changes to a related corporation are ratified prior to synchronization with the parent corporation.



Every version of DT Max T2 includes a six scenario tax planning tool that

preserves your current file and yet, can be used to build the production return. Use the DT Max tax plans to create up to six simultaneous plan versions for each client. For example, with related corporations you can easily identify the fiscal incidences of the allocation of various amounts for each of the corporations in the group.

After importing the General Index of Financial Information (GIFI), simply click to synchronize Net income and Tax on capital groups.

Preventing errors saves time and avoids rejection of the return.

Behind DT Max T2 is a rigorous errors and diagnostics structure that clearly identifies as warnings - errors that prevent filing (due to missing information required by the CRA, for example), errors in GIFI data, or errors that will prevent calculation of the return, so that they can be resolved quickly and easily.

DT Max T2 includes forms and calculations for the special compliance needs of the resource industry, credit unions, financial institutions and insurance corporations at no extra charge.

DT Max T2 also has a unique registered charity module included for free. Returns for registered charities practically prepare themselves with a pre-designed input template just for them.

Like all DT Max products, DT Max T2 produces the Federal, Quebec and Alberta equivalent returns simultaneously. Your Quebec CO-17 returns can be electronically filed with .jpg, .gif or .pdf files attached to support the return.



Grace Giordano

T2 Product Manager

Due to the continuously changing landscape of corporate tax, it takes strong analytical skills and attention to detail to keep DT Max T2 current and certified by a range of government authorities.

Also, the relationships my team has fostered with different government bodies are of vital importance to the ongoing development of the T2 product. As product manager, I am extremely proud of DT Max T2 and of the positive feedback we receive from users of the product.





DT Max T3 is designed not only for those who specialize in trust returns but also for those who are faced with this task only occasionally or annually.

DT Max T3 has all the tools you need to complete all kinds of testamentary and inter vivos including TFSA and ELHT.

The single screen input and right-hand side display features of DT Max are ideally suited for T3 tax preparation.

Details such as beneficiary information are brought forward annually for use in preparing the return, and .pdfs of T3 slips can be securely emailed or delivered quickly to beneficiaries using DT Client Portal.

Like other DT Max compliance products, T3 has a customizable, informative Trust Client List.

It offers advanced calculations with the entry of only basic tax information as well as diagnostics, extensive worksheets and reporting.

DT Max includes an integrated billing module and an advanced, automated T3 Adjustment feature that provides clear and concise comparison of results while maintaining a copy of the tax return as originally filed.

“ I use DT Max, the T3 version, to prepare testamentary trust tax returns. We prepare five each year.

I find the DT Max software to be easy to use, especially for subsequent years after the first return is prepared.

I would highly recommend DT Max as it greatly simplifies the preparation of trust tax returns. ”

[Daniel Engels]
DANIEL ENGELS
East York, Ontario



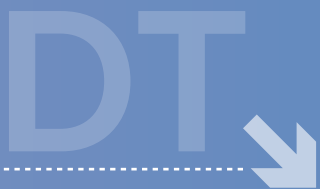
Debbie Williams

T3 Product Manager

I have a passion for research and taxation and enjoy the challenge of developing new products.

As product manager, I am very proud to have developed DT Max T3 and to maintain its integrity. The client experience is extremely important and I strongly believe that the feedback we receive from our clients is a key component for transforming a good product to a great product.

Our commitment to client satisfaction is what sets DT Max T3 apart from the competition.



DT Max T5013 is the only fully-functional stand-alone tax product in Canada for partnerships. This newest member of the DT Max tax compliance family is true to its roots promising concurrent support for the Quebec TP600 and dedication to one-time data entry for repeat-use values. As with all DT Max products, the T5013 will retain all partner details and identification from year to year, saving time and avoiding input errors.

Why is the T5013 from DT Max a stand-alone product? Preparation of T5013/TP-600 can be complex and repetitive. The DT Max carry-forward functionality and virtually unlimited database capacity makes it a perfect choice regardless of how many T5013s cross your desk each year.

RETURNS FILED FOR TAX YEAR 2013



T5013

“DT Max offers a wide array of very useful features. All Canadian jurisdictions are covered and you can prepare pre and post-bankruptcy returns.

The automatic optimization is really efficient and ensures the best possible tax result for my clients. From income splitting to credit transfers, DT Max does it all.”

[Sam Makarios]
BEILES & FRANK



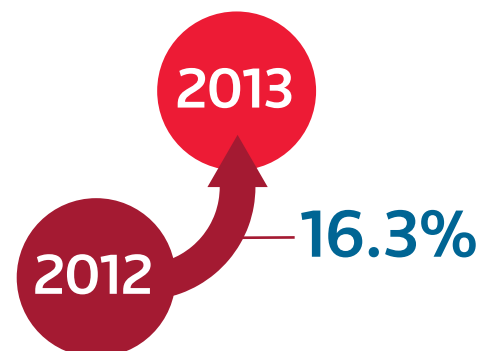
Your DT Max client database is one of your most valuable assets. Easy extraction of data from your client’s file to prepare a report or to complete an in-house form is made possible by the use of the DT ToolKit.

This valuable tool can allow for the import of data into a client’s file.

All you need is the right DT Max licence, a little imagination, our Software Developers Kit and your IT specialist or one of our own can help you simplify your life – at the office, that is.

Contact us about ordering a Network Licence for DT Max so you can use the DT ToolKit all year round.

RETURNS FILED USING EFILE - PERCENTAGE INCREASE 2013 FROM 2012



SDK

“DT Max is an intuitive and versatile suite of tax software products that I have been using for over a decade. The applications take care of the tedious and mundane steps allowing me to focus on the value-add to my clients.

The software, itself, is elegantly designed and coded. This is evidenced by the small number of known issues disclosed when the T1 product is released in February. This demonstrates strong regression testing, user acceptance testing and quality controls in place at DT Max.”

[John Scali]
JOHN SCALI, C.A.

On occasion, your staff need additional, sometimes obscure forms and may even need the same form year after year.

They need a software that is easy to use and comprehensive. They need a product that includes T4s and T5s for your small business clients.

DT FormMax offers hundreds of forms, slips and summaries for individuals, corporations, partnerships and trusts. Forms are easy to find thanks to our unique Form Filter and the intuitive Form Navigator.

DT FormMax automatically fills forms with the information it has in hand with direct access to editable forms and performs the necessary calculations. And, unlike other forms products, **DT FormMax** provides comprehensive error detection and warning messages for missing, incorrect or overridden data.

DT FormMax automatically carries forward to the next year permanent data such as name, address, social insurance number or business number. This allows you to save time since you do not have to re-enter this information each year.

Of course, Internet File Transfer is included at no extra charge.



“ We have used DT Max for over 20 years. The DT Max software was easy to learn, especially in the early years when other software programs were so cumbersome.

All the data is input from one screen. It is much easier to review your work or someone else's when all the data is on one screen. With a database of 10 years' worth of returns, we can easily move between years to compare data.

The DT Max Planner program provides us with opportunities to run “what if” analysis and bill the clients for this additional service.

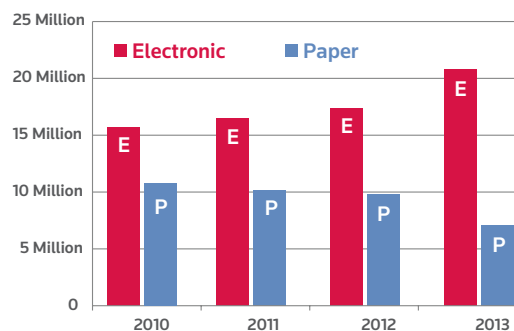
The DT Max Support personnel provide quick responses to our questions which means we have very little downtime.

We recommend it to all our franchisees. Currently we have over 100 offices using the software. ”

[**Barry Taylor, CPA, CA**]

VP Franchise Support
Padgett Business Services of Canada

ELECTRONIC FILING VS PAPER FILING



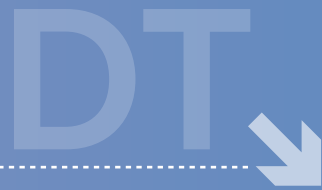
Kathy Spyropoulos

Senior Manager -
User Services

The Support team for the DT Professional Suite of products is extremely diverse. This diversity contributes greatly to the team's enthusiasm and efficiency.

In Support, it is not enough to be knowledgeable; courtesy and concern for the clients are just as important.

My 25 years of experience as a tax professional give me a good perspective on the needs of our clients. I want them all to experience a strong, positive relationship with the DT Professional Suite of products.



PAPERLESS DOCUMENT MANAGEMENT

DT FileCabinet is a feature-rich digital document management system, designed for tax and accounting professionals, that enables you to electronically store, organize, and access documents, reports, tax returns, and other files on your computer or network.

With its advanced technology, state-of-the-art functionality and sophisticated features, **DT FileCabinet** lets you easily create a paperless environment and enjoy the countless time-and-money-saving benefits of a paperless office.

DT FileCabinet is part of the innovative DT Professional Suite. Management of the documents and data generated for those clients is easy and secure with **DT FileCabinet**, the paperless document management system.



DT FileCabinet is fully-integrated with all DT Max tax compliance products and makes it possible for your firm to achieve unprecedented

levels of efficiency through integrated paperless workflow. When you combine the paperless capabilities of **DT FileCabinet** and the Internet, you can streamline your workflow, improve profitability, save time and enhance client service for your firm.



DT FILECABINET AND DT MAX

DT FileCabinet will

offer the greatest value and added benefit to existing DT Max users. As part of the DT Professional Suite of products designed to make Canadian tax and accounting professionals more productive and more profitable, DT Max and **DT FileCabinet** are fully-integrated and capable of saving you money and time by streamlining your workflow in ways you never imagined.

Currently, your forms manager tool allows you to determine what pages will be printed for a variety of destinations – Federal, Client, Client letter, etc. With the installation of **DT FileCabinet**, you will also choose which of these destinations will be stored in **DT FileCabinet**. Finished returns printed from DT Max to **DT FileCabinet** automatically populate the appropriate client's drawer in a read-only format.

Scanned documents are also sent to **DT FileCabinet** and stored for easy access during and after tax preparation, offering an easier and more streamlined solution to respond to post-assessment CRA requests. Print virtually any document directly to **DT FileCabinet** from Excel, Word or your accounting software using the print driver installed with **DT FileCabinet**.

While in any screen of DT Max, use the **DT FileCabinet** toolbar button on the menu bar to launch **DT FileCabinet** and open the file drawer of the current client.

SCAN IMAGES OF SOURCE DOCUMENTS AND STORE THEM WITH RELATED DOCUMENTS

You can quickly scan images of source documents such as tax slips into **DT FileCabinet** by placing the document on a TWAIN-compliant scanner or document feeder and clicking **DT FileCabinet's** Scan button in the toolbar to open your scanning software. It's that easy! With just a click of your mouse, you can also easily save scanned documents in the appropriate client folders with other related documents.

Documents you may want to scan include tax slips (T4, T3, etc.), receipts, real estate closing documents, lease agreements, shareholder or partner agreements, invoices, photos of fixed assets, hand-written notes, and any other documents you need to reference during tax and accounting processing or want to add to a client's file.



Gerry Vittoratos

Lead Trainer

The favourite part of my job is introducing tax preparers to DT Max. Every year I train hundreds of people on DT Professional Suite products and the moment I really love is when they realize "Hey, this really works."

I have many years of experience in tax preparation and teaching but this is the most fun – so far!

PROFESSIONAL, CUSTOMIZED WEBSITES FOR ACCOUNTANTS AND TAX PROFESSIONALS

DT Web Builder is a service of the DT Professional Suite which will create and host affordable, customized websites for tax and accounting professionals.

Why Does Your Firm Need a Website?

Websites work. Whether your firm is small, large or in-between, well-established or brand-new, having a web presence generates business. It delivers your message in a way that reflects your firm's unique personality - 24/7, 365 days a year.

Canada Is Looking for Your Firm

Canadians are among the world's most active Internet users. Every day, Canadians use the Web to find the services they need, including accounting and tax firms just like yours.



Odds are people have used search engines to look for your firm and have not found you. Those prospects are now someone else's clients. In today's digital world, a website is as important as having a physical location.

Your Clients Will Use Your Website

Your new website will help your clients get directions to your office, request an appointment and stay up-to-date with the information you place on your website regarding your firm, new tax rules or anything else they need to know.

Your website is the place to house helpful articles, a blog, blank forms or monthly newsletters to clients that will stimulate business.

When you add DT Client Portal to your website, your clients have a secure conduit to instantly exchange files with your firm.

DT Web Builder and DT Client Portal together deliver this important message: Your tax and accounting firm provides the best possible customer service and employs the latest technologies to do so.



We Build It for You

Our dedicated staff will build a website for your firm with a unique look, address and

message. Simply describe what you do and provide basic information about your firm and we do the rest! Our team will ensure your firm has a cutting-edge, attractive, and original website with your logo, custom photos, a description of your firm and its principal members and more. We do the work, you accept the compliments.

BENEFITS OF DT WEB BUILDER

HAVING YOUR OWN CUSTOMIZED WEBSITE IS QUICK AND AFFORDABLE.

Stay focused on your business. With **DT Web Builder**, having a professional website couldn't be simpler.

Tell us all about you and your firm, its location, its principal members and its list of services. Our team will work with you to build your website, exactly how you want it.

Choose from a variety of industry specific pre-written text or create your own - we'll help you edit the text as needed. Interested in even more customization? Adding videos, a blog, pictures and more to your site is just a click away.

Give clients the opportunity to learn more about your team by adding bios too.

Your new website is easy to change. Adding new pages, or editing text is simple thanks to a user-friendly backend interface. You can make changes yourself or call your DT Professional Suite consultant to apply your changes.

Your new website will have its own domain name (e.g. www.yourfirm.ca) and full search engine optimization so that it is easy for clients and potential clients to find you. It also comes with a handy tool to gauge the effectiveness of your online presence that includes useful statistics, such as how many unique and return visitors there have been to your website.

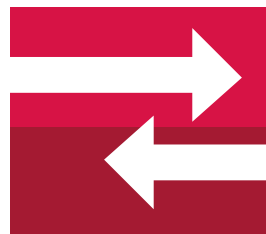




Now, it's easier than ever for your firm to serve clients with fast, secure, and convenient online services.

Your clients rely on the web to complete tasks such as paying bills, reviewing financial information, and managing various online accounts, so it's only natural they'd expect online access to the services of their tax and accounting professional.

DT Client Portal is a private, secure extension of your website providing your clients 24/7 access to your services. At their convenience, clients can retrieve and review personal financial documents and tax returns or use available online communication tools to connect with the firm.



BRIDGE THE PAPER GAP BETWEEN YOU AND YOUR CLIENT

DT Client Portal offers you and your clients an ultra-convenient way to securely access documents, finished returns and other files, transfer data, and convey information. With **DT Client Portal**, each client is assigned a private, password-protected portal. The client portal is a secure extension of your website and your firm and provides your client 24/7 access to your services.

DT Client Portal allows you to reduce printing, postage, filing costs and save time with instant document exchange with clients. No more need to try and arrange convenient times to meet with clients or play schedule tag – when tax returns, financial statements, and other documents are ready, simply post them to the client's portal for their review.

DT Client Portal helps you elevate client service while reducing costs overall.

It's easy for your clients to use **DT Client Portal**; they simply access your firm's website, click the Client Login link, and enter their personal login and password.

SEAMLESS PRODUCT INTEGRATION INCREASES PRODUCTIVITY (AND PROFITS)

The applications and tools in the DT Professional Suite are designed to work seamlessly together as an integrated system. Built-in integration between DT Max and DT FileCabinet, our fully-featured paperless document management system, allows DT Max users to populate **DT Client Portal** automatically. DT FileCabinet enables firms to establish a paperless office where all client slips, documents, reports, and returns are digitally stored and managed.

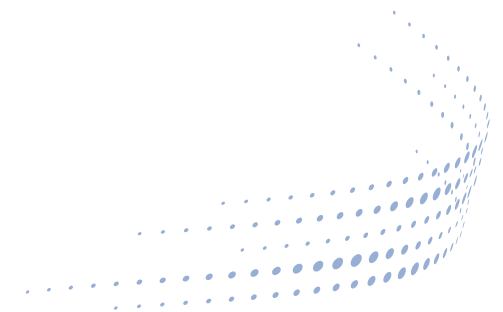
All content in each client drawer of DT FileCabinet is available to be posted to **DT Client Portal**.

DT Client Portal integrates seamlessly with DT FileCabinet to streamline your workflow, improve profitability, save time and enhance client service for your firm. When you add the power of **DT Client Portal** as a component of your current website, you give your clients secure and instant access to the documents they need anytime, anywhere – no email, no paper.



YOUR CLIENTS WILL LOVE DT CLIENT PORTAL

By clicking on the Client Login link on your firm's website, they are prompted for their personal login and password to access files and upload documents to your firm. **DT Client Portal** even offers a mobile app, available as a free download to Apple® and Android™ devices, placing communications and documentation from your firm in the palm of the hands of your clients.



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