BUSINESS CASE 07 / PRIVATE TAX ADVISORY

Online filing cabinets for your clients.

Give every client a filing cabinet with your branding. Documentd automatically files completed returns, calculations and tax advice for them. Give them an organised record by tax year or engagement and reduce requests for past documents.

IMPORTANT TAX RECORDS

Start with the documents clients need to keep.

A completed return or calculation can be needed again for borrowing, a later transaction or a future tax enquiry. File the client's copy when the work is complete, so it is ready to find without reopening the original correspondence.

- Filed tax returns
- Final tax computations
- Capital gains calculations
- Tax advice reports
- HMRC correspondence
- Inheritance tax documents
- Other important completed tax records

Your clients should have their own copies, in an account they control.

AN ORGANISED HOME FOR TAX RECORDS

Make completed tax records easy to return to.

A client may need a particular year's return long after the filing deadline. Keeping completed returns, computations and advice in clearly named folders helps them find the relevant record without asking your team to retrieve it.

Documentd automatically files these documents in each client's own cabinet, organised and ready to find. Your branding and dedicated web address give clients a familiar place to return to for the records you send.

A BRANDED SERVICE, INDEPENDENT ACCESS

Your branding. Your clients' own records.

Give clients a branded filing cabinet with a simpler, lower-cost service than a document portal. Start with web send, then add copy-in once your company is set up, without a portal development project. Your branding makes the source of their documents clear; their copies remain under their control.

Your cabinet sits within the client's own Keepd account. Keepd is free and works with any email address, bringing together their cabinets from different businesses and documents they file themselves. From your cabinet, they can navigate to the rest of their account.

Their copies remain available after an engagement ends or they change tax adviser.

Your branding gives clients a familiar place to return to. Their ownership means access to their copies does not depend on your systems.

LESS ADMINISTRATION AND FEWER RESENDS

Reduce repeat requests for completed work.

Retrieving old returns and calculations adds work outside the original engagement, often during a busy filing period. Clients who can find their own copies have less reason to ask your team to locate and resend them.

- Fewer requests for prior-year returns and computations
- Less time searching historic engagement files
- Less printing and postage for completed document packs
- Client access that continues after a change of adviser

Assess the benefit using your own document volumes, support workload and postage costs, alongside Documentd's charges.

A SIMPLE START FOR YOUR TEAM

Start with a completed return and computation.

Try web send with a sample document sent to yourself. Then use one completed tax engagement to establish a simple folder structure by tax year or type of work.

Once your company is set up, send from the website or copy filing@documentd.com into your normal email. Copy-in files the attachments in each recipient's cabinet; your ordinary email and attachments still go to the recipients as usual.

Email integration and the API are available for more involved workflows when you need them.

LASTING ACCESS TO IMPORTANT RECORDS

Tax documents can remain important for many years

A tax engagement may relate to one return, transaction or planning exercise, while the documents it produces can remain useful long afterwards. Clients may need them for future returns, HMRC enquiries, borrowing, transactions, estate planning or simply as a record of their financial affairs. The copy protections described here apply to documents filed through Documentd, rather than files uploaded directly in Keepd.

Personal to the client

The document is delivered directly to the individual client.

Accessible later

The client retains long-term access independently of the adviser's portal.

Reliable historic copy

The sender cannot alter the settled copy filed through Documentd.

Further detail: documentd.com/business-cases/private-tax-advisory

THE BUSINESS CASE

Less repeat administration. Tax records your clients control.

Your branding. Automatic filing. Records your clients can keep and find independently of your systems.

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Assess costs and savings against your own processes and Documentd plan.