

This ten-point client portal benefit sheet was developed to help our clients in the construction, real estate, and small business areas, to be informed about client portals and how we leverage it to share data, securely.

1. **Mobility.** As long as you have an Internet connection, you can access our cloud-based client portal 24/7/365. This offers the flexibility to review data anytime, anywhere and to make important decisions for your company when needed.
2. **Efficiency.** Since multiple people may access the client portal—provided they have the access—this allows data sharing and efficiency to be increased. Old versions, lost emails, and snail mail are a thing of the past.
3. **Real-time.** Cloud-based portals allow our staff and clients to work together in a live, online environment; so, everyone is looking at the same versions, updates, and documents at the same time.
4. **Independence.** Hardware and software independence means users do not have to maintain hardware and software updates on their systems. All that's needed is access to a computer/mobile device/tablet, and the Internet.
5. **Costs.** Because many cloud-based tools allow for monthly subscriptions, there is little need to sign lengthy contracts with software developers to provide software upgrades, patches, etc.
6. **Scalability.** When client portals become too dense, they are fairly easy to scale. For example, if you own a large company with several offices, and have a huge tax return requiring multiple files, the portal can be scaled to meet your needs.
7. **Upgrades.** Because cloud solutions are Internet based, it's much easier for updates and patches to be deployed and implemented than if you needed to install patches on your own.
8. **Accessibility.** Let's say your computer is stolen and you need to access your data. Because the content is stored in the cloud, you are not dependent on a single device to access it. Simply login using a secure username and password, an Internet connection and voila, there's the data.
9. **Redundancy.** Cloud-based solution providers use multiple physical locations to store data, called a redundancy plan. This allows for backups to be made in two or more geographic, off-site locations, which helps reduce the risk when a local issue arises, such as a fire, flood, ice storm, etc.
10. **Document Management.** Because the client portal allows for data to be stored online, with file folders and structure, it's easy for you and us to view the data when needed. It's organized, easy to get to, and accessible via a secure login and link.

[Contact Lang Allan and Company CPA](#) if you need help securing your financial data. We use a secure client portal to help minimize security risks for our clients.