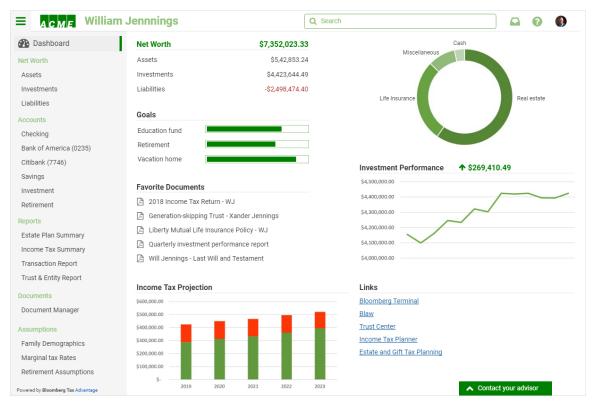
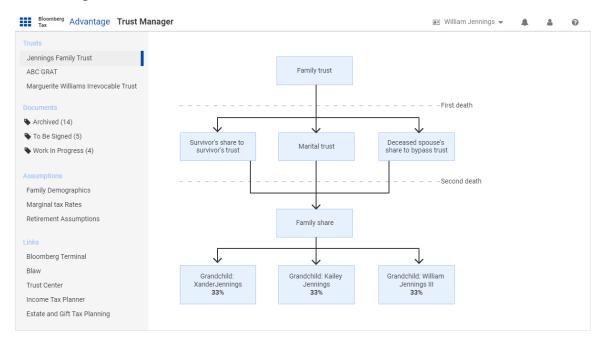
Wealth Management

Client Portal

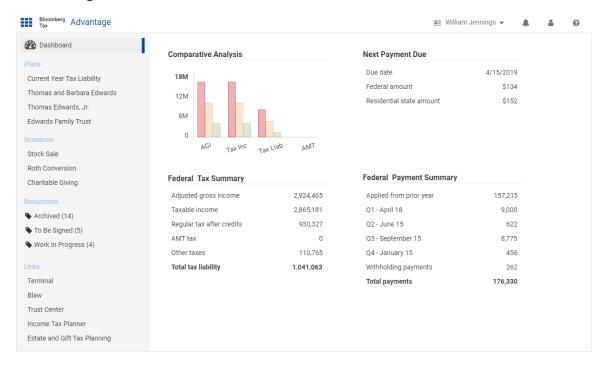
Idea here is that "ACME" is the CPA firm and William Jennings is the client. This is the view exposed to William Jennings.



Trust Management



Tax Planning Dash



Practitioner Dash

Dashboard showing the CPA everything they have on the go.

