



## Crowe Soberman at a Glance

- Accounting & advisory firm
- No. of staff: 200+
- TitanFile client since: 2016
- User adoption rate: 90%
- [www.crowesoberman.com](http://www.crowesoberman.com)

“Since deploying TitanFile, our firm has seen great improvement when it comes to client communication, deliverables and is experiencing quicker turnaround times. Our clients love that they can scan and upload receipts, tax documents, and other files to our secure client portal all year round.”



**Murtaza Lukmanji**  
Director of IT

# TitanFile enables Crowe Soberman’s clients to securely upload receipts, tax documents, and other files all year round



## About Crowe Soberman LLP

Crowe Soberman LLP is one of the largest public accounting and advisory firms in Canada. The firm provides audit, tax, advisory and risk services to small and medium-sized businesses, individuals, not-for-profit organizations and public companies.

As a result of continuous innovation and comprehensive client focus, Crowe Soberman has won the *Best of Accounting Award for Client Service Excellence* for four consecutive years from 2017 - 2020.

## The Challenge

As an accounting and advisory firm, large volumes of sensitive financial documents flowed between Crowe Soberman and its clients on a regular basis. In the past, the firm’s staff had been exchanging files with clients using a few different mediums including: email, courier, and file sharing apps. However, these solutions posed several challenges:

- Emails were not secure and could potentially get intercepted by unauthorized parties
- Mailing documents through courier was inefficient and consumed a lot of paper
- Existing file sharing apps did not provide adequate levels of security
- Clients did not have self-serve access to sending files to the firm securely

The IT leadership team recognized an opportunity to standardize on a secure solution that enabled the firm’s accountants, auditors, and advisors to exchange information virtually with clients. The goal was to deploy a solution that was easy to use and provide clients with a secure repository where they could upload files and have access to them all year round.



**“Our staff and clients really like how files and messages are kept organized in one place. With so much information flowing back and forth, TitanFile has made it much easier to manage client communication securely and has given everyone peace of mind.”**



**Nader Fadel, CPA, CA**  
Senior Manager,  
Audit & Advisory

**Interested in learning more about TitanFile?**

**Book a demo at:**  
[titanfile.com/book-a-demo](https://titanfile.com/book-a-demo)

## The Solution

TitanFile offered the perfect combination of intuitive user experience and enterprise-grade security features.

The solution was deployed as a 100% web-based, custom-branded client portal that could be accessed from any location and any device. Crowe Soberman’s CPAs, support staff, and clients had easy access to exchanging files and messages, and keeping them organized in preset folders. In addition, clients could log in at any time to upload receipts and supporting documentation, review documents prepared for them, and have a conversation with their accountant all in one secure client portal.

On the security front, TitanFile offered encryption in-transit and at-rest, Canadian data residency, Single Sign-On integration, two-factor authentication, and audit logs to validate that files were delivered and accessed. TitanFile checked off all the security and compliance boxes which gave the firm’s partners and clients peace of mind.

## The Result

TitanFile is now rolled out enterprise-wide to over 150 accountants, auditors, and advisors at Crowe Soberman and is being used to service thousands of the firm’s clients.

The success of the TitanFile deployment was indicated by four criteria:

### 1) Improved security

The firm’s staff and clients have peace of mind knowing that all sensitive financial information is shared and stored on a secure platform.

### 2) Client satisfaction

Clients are happy to have self-serve access to a secure client portal where they can simply scan and upload tax and other financial documents and have access to them throughout the year.

### 3) Improved turnaround times

During tax season, Crowe Soberman’s accountants and advisors have easy access to the information uploaded by clients and are able to prepare tax returns and other reports more quickly.

### 4) The shift to paperless

With staff and clients being able to exchange files with clients securely over the cloud, the firm has almost completely eliminated the need to send and receive paper documents by mail.

### About TitanFile

TitanFile is an award-winning secure messaging and file sharing platform for external correspondence among professionals, their support staff and clients. TitanFile is as easy to use as email, resulting in increased efficiency, cost savings and higher customer satisfaction while improving security and compliance.