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R. Brooks Malone III, CPA and partner
Hughes Pittman & Gupton, LLP

Company

Hughes Pittman & Gupton, LLP

Industry

Accounting

Location

Raleigh, N.C.

Number of Employees

80

Business Challenge

- + Firm needed an easier way to send large, confidential files.
- + Printing and shipping documents was expensive and time consuming.
- + Organizing files for multiple clients was difficult.

Business Results

- + Sending confidential client information securely is effortless.
- + Firm is completely paperless, which saves time and money.
- + Client files are easy to organize.

How Hughes Pittman & Gupton saves time and money with Citrix ShareFile

Hughes Pittman & Gupton (HPG), one of North Carolina's largest independent CPA firms, deals with confidential tax and financial information on a daily basis, so file security is a high priority.

As a Green Plus Certified accounting firm, HPG wanted to be completely paperless and sought a secure electronic file-transfer solution to replace the costly and time-consuming method of printing documents and burning CDs to exchange files with clients. Email, with its file-size limits and lack of security, was never an option for the firm.

"If you accidentally hit the wrong email address, you blatantly send the wrong information to the wrong user. That is not secure," says R. Brooks Malone III, partner at HPG. "Not only that, even if you tried to email a QuickBooks file, it would probably just bounce back because of the large file size."

Finally, HPG found a solution: ShareFile.

Since becoming one of ShareFile's earliest adopters, HPG has eliminated all security concerns and operates as a paperless firm.

"In an audit process, we request and receive hundreds of documents. One client may have documents that would fill up notebooks and notebooks of paper," says Malone. "With ShareFile, we have none of that."

Now, accountants can give clients a secure ShareFile link, which sends them directly to individual folders within an online portal, where they can securely upload tax and financial documents. From ShareFile, accountants can directly transfer audit files into their paperless accounting software. With tracking features and notifications, accountants also can easily track and manage files for multiple clients.

"ShareFile has definitely made us more efficient, and it's made our operational processes a bit smoother, allowing us to have more time to actually do our jobs," says Malone. "We're not just doing what's easier for us by using ShareFile. Because it's more secure than email or printing, we're doing the right thing by our clients."