

## TAX WORKFLOW SOLUTIONS

# Why Firms Choose *Soraban* Over Other Solutions

Most tools help manage the work. Soraban gets it done — from intake to delivery.



### Point Solutions

SafeSend, SurePrep, StanfordTax — focus on one piece of the workflow. Needs to be stitched together.



### Broad platforms

TaxDome, Canopy, HubSync — tend to be great at core competencies but often lack depth in other features.



### Execution Layer

Works with your Practice Management and Tax Software through the entire workflow. Intake, prep, data entry, and delivery.

## Is Soraban the right choice for firms like yours?

### NOT A FIT IF:

- ◆ You're doing a few hundred or fewer returns per year that isn't straining your team
- ◆ Your team hardly touches returns until they are ready for review and delivery
- ◆ You prefer to keep your current process, even if it involves manual steps
- ◆ You want to DIY your own AI solution with your team or outsourced help for customization and maintenance

### IDEAL IF:

- ◆ You're handling 500 or more returns and feeling capacity pressure
- ◆ Your team is chasing documents, re-entering data, or spending time organizing documents
- ◆ You want to increase output without hiring more staff
- ◆ You want a trusted turnkey AI workflow system that will help drive efficiency quickly

## SO HOW DOES SORABAN STACK UP?

	Soraban	SafeSend	SurePrep	TaxDome	Filed	Juno	Truss	Stanford Tax	Liscio
See what's actually missing	✓	✓	✗	✗	✗	✓	✓	✓	✗
Dynamic, conditional intake	✓	Limited	Limited	✓	✗	✓	✓	✓	✓
Direct-to-tax software sync	✓	✗	✓	Third-party	✓	Limited	✗	✗	✗
Easy source doc upload for clients	✓	Limited	TaxCaddy	✓	✗	Complex	Basic	Intake-only	✓
No chasing clients for follow-ups	✓	Limited	✗	✓	✗	✗	✗	✗	✓
White-glove onboarding and support	✓	✗	✗	✗	✗	✗	✓	✗	✗

Firms choose **Soraban** when they want to reduce admin work across the entire tax workflow, strengthen client relationships, and scale profitably.

See How Your Workflow  
Would **Run With**  
**Soraban.**

