Finigree Operating System for CPA's & Accountants

Communicate and Collaborate Securely, Quickly & Accurately with Your Customers

Flexible Platform Design Works with Firms of Any Size

Used by Financial Institutions Across the U.S. to Gather, Store & Share Financial Documents and Data

Finigree

Customized Collection & Collaboration

Custom built data intake and customer onboarding forms for any size business and changes made in minutes. Our unique, permission-based collaboration features allow multiple parties to be invited into secure collaboration instead of passing data and documents back and forth.

Secure Communications

Protect your customers and your firm with built in secure E-mail, at no extra cost to you. As an added benefit, provide your customers with a secure document storage solution, again, at no extra cost to you!

Messages
Send and Receive
Secure Messages

Anywhere, Anytime, Any Device

The Finigree Operating System is mobile-responsive giving you a way to connect with your customers, anywhere in the world. Smartphone cameras instantly scan and convert images to PDF files for easy delivery.

Affordable for Firms of Any Size

The Finigree pay-as-you-go price structure makes it an affordable solution for firms of any size.