

## Accounting Firm Reduces Email Risk with Secure File Transfer

### The Challenge

For a high-profile accounting firm, the challenge to find a replacement for the firm's email security service came as a sudden surprise. In late October 2015, Intel announced the End-of-Life (EOL) of its McAfee Email Security Solutions, and a founding partner of the firm had to face the unforeseen responsibility of finding a suitable replacement for the firm's secure file transfer system. For an accounting firm representing thousands of clients (both corporations and individuals), ensuring the confidentiality of sensitive financial data remained a top priority.

As an early adopter of email encryption technology, the firm has strived to stay ahead of the curve in terms of the quality and security of its services. "We are primarily a tax practice and we prepare tax returns for our clients. It doesn't get more confidential than that. People value their social security numbers and earnings records and need a secure way to send and receive that information," the partner stated. The abrupt EOL of McAfee's solution presented an immediate challenge to ensure consistency in the quality of the firm's future ability to provide

those services, but the EOL also offered an opportunity to evaluate and compare advanced alternatives.

"We're constantly dealing with large files going back and forth, but we were having problems with people wanting to send encrypted files back to us. A lot of other products offer a simple way to encrypt an email and send it out, but very few offer a way for the client to send it back to you. Finding a secure solution that allowed us to bring more value to our clients by allowing them to back-up, encrypt, and send us their files without having to subscribe or pay for another service was ultimately what drove our decision making process," the partner said.

The widespread client use of diverse cloud storage services to transfer large files also presented a challenge in the daily operations of the firms. The process of keeping track of individual passwords for each client storage account interfered with the efficiency of services provided.

Of the three email security offerings the firm considered, only one offered a way to send encrypted files back and forth with

no restrictions on file size. The other two provided basic secure email services, but they could not meet the firm's expanding workflow requirements in a way that would better serve the needs of clientele. Only one provided the answer for the firm's business needs.

### The Solution

Litera Microsystems Secure File Transfer offered the firm an alternative email security solution to send encrypted files back and forth between clients. As an on premise encrypted file transfer service, it improved the firm's previous service with MFA (multi-factor authentication) and two-factor authentication, no limits on file size, a customizable retention/expiration period, and the ability to request files from clients.

"We use Secure File Transfer® to transmit client tax returns electronically and to transmit sensitive financial data back and forth between clients, but we're also using it more for large file transfers than I thought. I initially thought people would be more reluctant to stop using their familiar cloud storage services, but they are using Secure File Transfer more readily

### A Prolific Accounting Firm

The firm has operated since 1993 as a prolific accounting firm servicing small to medium size businesses and individuals.

The firm's Senior Partner and its Principals were formerly with a medium size accounting firm from Central New Jersey.

Over the course of a decade, the firm's Principals have devoted time and effort to create a philosophy of customized professional services specific to customer needs. The firm does this by thoroughly understanding each customer's business to devise the most cost effective solutions.

These services are accomplished through a combined effort of intellectual ability, state of the art technology and the benefits of practical experience. The firm prides itself in being able to deliver sophisticated technical services to those who ordinarily would not have access.

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— **Founding Partner, High-Profile Accounting Firm**

for sending large files securely. It's even better for us because it takes care of the need to manage so many passwords. The best thing, however, is the ability to have our clients email or transmit us sensitive financial data easily and securely without having to register or subscribe to anything themselves," the partner commented.

Apart from allowing back-and-forth encryption, the service also stood apart from alternative solutions with its ability to clean metadata and the option to apply the firm's custom branding to the web portal, Outlook add-in, and Mobile app.

"What we couldn't do [with McAfee], and what you can't do [with other solutions] is customize the branding. It looks like us when people see it," said the partner.

### The Result

Although the EOL announcement of McAfee Email Security Solutions forced the partner to seek after an alternative solution, it provided the opportunity to discover a secure file transfer system better suited to meet the needs of his

firm. The firm's implementation of Litera Microsystems' Secure File Transfer in late November 2016 was "straight-forward" and "seamless." Transitioning both staff and clients to use the new service was "simple" and "easy." Both the staff and the customers like having the option to use either the web portal, Outlook add-in, or the Mobile app. Per the partner, each portal provides an equally reliable and simple UI, but it gives people the flexibility and the option for secure mobility. Between the users, the clients, the partners, and the staff, some exclusively use either the add-in or the web portal according to each individual's personal preference.

"Compared to what we were using before, Secure File Transfer has been very well received by both our staff and our clients. Ease-of-use and simplicity is big. It makes our clients happy and everyone's lives easier; it's impossible to put a number on that kind of value. Ultimately, our clients trust us; we have a very high retention rate. Using this service gives our clients even more confidence in

the quality of the services we provide," the partner stated.

At the time of the interview, the accounting firm was moving into its busiest time of the year with the onset of the 2017 tax season. So far, loading and upload times are faster than the previous solution with file sizes ranging from 2MB to 186MB.

"We are a service organization," the partner concluded, "Anything we can do to bring value to our clients we do. Historically, the biggest difference using Litera's Secure File Transfer is the two-way street. As I said before, the ability for our clients to send us back encrypted files without them having to subscribe or pay to use another service is what led us to choose Litera over everyone else."

### About Litera Microsystems

Litera Microsystems is the leading provider of software for drafting, proofreading, comparing, repairing, and cleaning documents in the legal and life sciences industries worldwide.

Our core products empower users to generate, review, and distribute high-quality content quickly and securely, from any device.

Today, Litera Microsystems supports thousands of document-intensive organizations across the globe, helping them satisfy the complex demands of clients and regulators.

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