

# SmartVault Acquires SmartPath Intelligent Pricing Platform

*Acquisition accelerates the company's support of Client Advisory Services*

HOUSTON, TEXAS, UNITED STATES, June 18, 2024 /EINPresswire.com/ -- [SmartVault](#), a leading document management and client portal platform purpose-built for accounting professionals, today announced it has acquired [SmartPath](#), a pricing intelligence and revenue optimization platform for the accounting industry. The acquisition, completed on April 4, 2024, accelerates SmartVault's offering in Client Advisory Services (CAS), an important and growing category of service offerings for accounting firms – from micro-businesses to larger high-growth firms.

SmartPath empowers firms to accurately present their value to clients by providing a solution to increase margins and client satisfaction. The unique offering enables firms to optimize their client billings and scale their delivery of Advisory services based on learnings from working with over 1,500 firms. SmartPath is uniquely positioned to support firms with the ability to increase profits and deliver higher-margin advisory services at scale.

"Accountants are flooded with apps that increase productivity, but there is a real need in the market for a solution that gives tax and accounting professionals the tools they need to offer, and be fairly paid, for their services," said [Dania Buchanan](#), President of SmartVault. "Clients



Dania Buchanan, CEO, SmartVault



## SmartVault

SmartVault Logo Document Management

have an increasing appetite for strategic advice, and firms need to grow profits. SmartPath is uniquely positioned to solve both issues, helping firms optimize pricing while transitioning into a wider range of Advisory services. We are thrilled to have the SmartPath teams' 15-year industry expertise in-house."

SmartPath founder William Hamilton joined SmartVault as Vice President, SmartPath, responsible for the overall growth and adoption of the product through the development of new product features, as well as continuing to educate firms on how to shift to a profitability mindset.



William Hamilton, Vice President, SmartPath

"SmartVault and SmartPath share a vision of making accountants productive, profitable, and happy," said William Hamilton, Vice President, SmartPath, "The challenges taxpayers and small businesses face are more complex than ever. They crave advisors to help make progress and navigate an ever-changing economy. SmartVault and SmartPath give accountants the tools for deeper client relationships and ultimate stability for their firms."

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SmartVault and SmartPath share a vision of making accountants productive, profitable, and happy. Together they provide tools for deeper client relationships and ultimate stability for firms."

*William Hamilton, Vice President, SmartPath*

SmartPath will continue to operate independently and maintain current business operations. The acquisition enables SmartVault's product team to collaborate with SmartPath and enhance SmartPath's offering with new features and capabilities, ultimately delivering greater value to customers as the products become more integrated over time. Learn more and sign up for a demo at [www.smartpath.co](http://www.smartpath.co).

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