



Combining Liscio and Karbon to deliver flawless client experiences

karbonhq.com | liscio.me



“Karbon has streamlined our processes and keeps us on track. I could not live without Karbon, Liscio, and Practice Ignition. Best apps ever.”

— Joshua Standley, EA, ABA; DKK Accounting

- 1. Close down any open apps**
- 2. Ask and we'll answer**

Meet your hosts

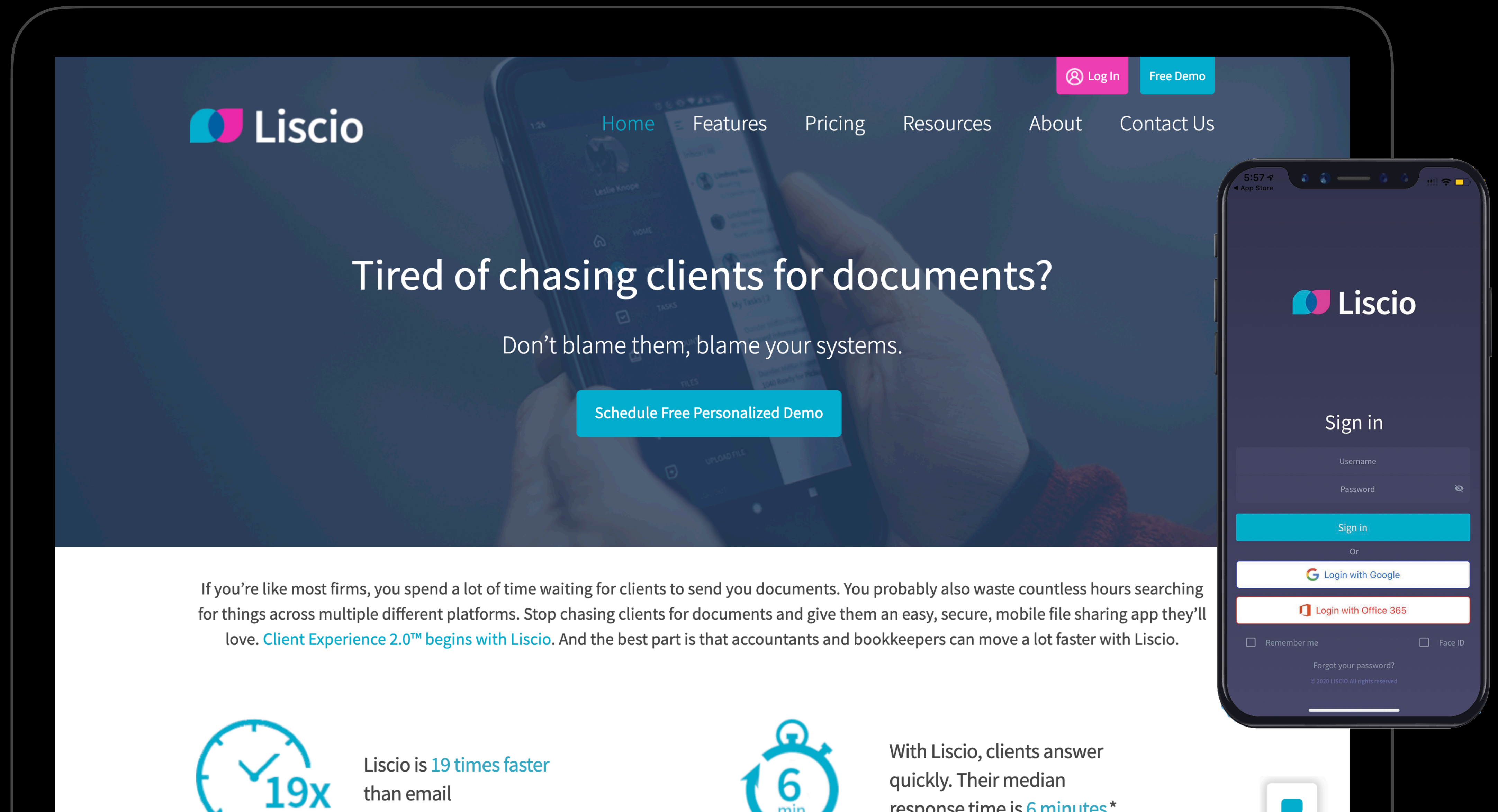


Chris Farrell
Liscio
Co-founder and CEO



Ian Vacin
Karbon
Co-founder and CCO

Assess your firm's client experience: Take our short quiz: <https://liscio.me/cxat>




The image displays the Liscio website on a tablet and the Liscio mobile app on a smartphone. The website features a dark blue header with the Liscio logo, navigation links (Home, Features, Pricing, Resources, About, Contact Us), and buttons for 'Log In' and 'Free Demo'. The main content area has a large heading 'Tired of chasing clients for documents?' and a subheading 'Don't blame them, blame your systems.' Below this is a blue button that says 'Schedule Free Personalized Demo'. The background of the website shows a hand holding a smartphone displaying the Liscio app interface. The mobile app interface includes the Liscio logo, a 'Sign in' section with fields for 'Username' and 'Password', a 'Sign in' button, and options to 'Login with Google' or 'Login with Office 365'. There are also checkboxes for 'Remember me' and 'Face ID', and a link for 'Forgot your password?'. At the bottom of the app screen, it says '© 2020 LISCIO. All rights reserved.'


Tired of chasing clients for documents?

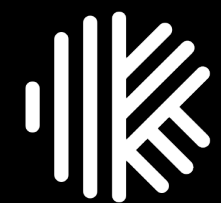
Don't blame them, blame your systems.

[Schedule Free Personalized Demo](#)

If you're like most firms, you spend a lot of time waiting for clients to send you documents. You probably also waste countless hours searching for things across multiple different platforms. Stop chasing clients for documents and give them an easy, secure, mobile file sharing app they'll love. [Client Experience 2.0™ begins with Liscio](#). And the best part is that accountants and bookkeepers can move a lot faster with Liscio.

 **19x** Liscio is **19 times faster** than email

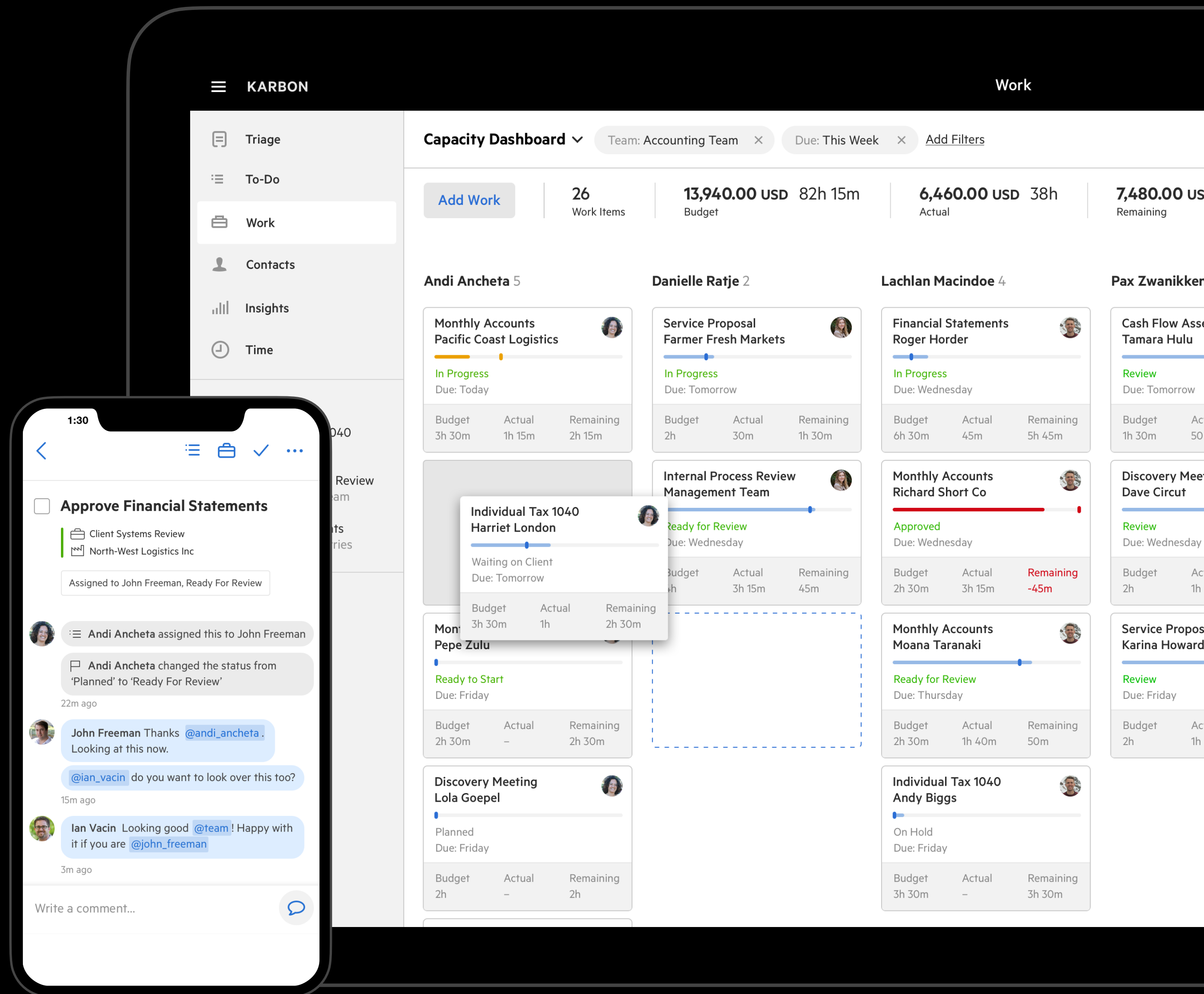
 **6 min** With Liscio, clients answer quickly. Their median response time is **6 minutes***



Work Management Software *for* Accounting Firms

karbonhq.com

GET STARTED



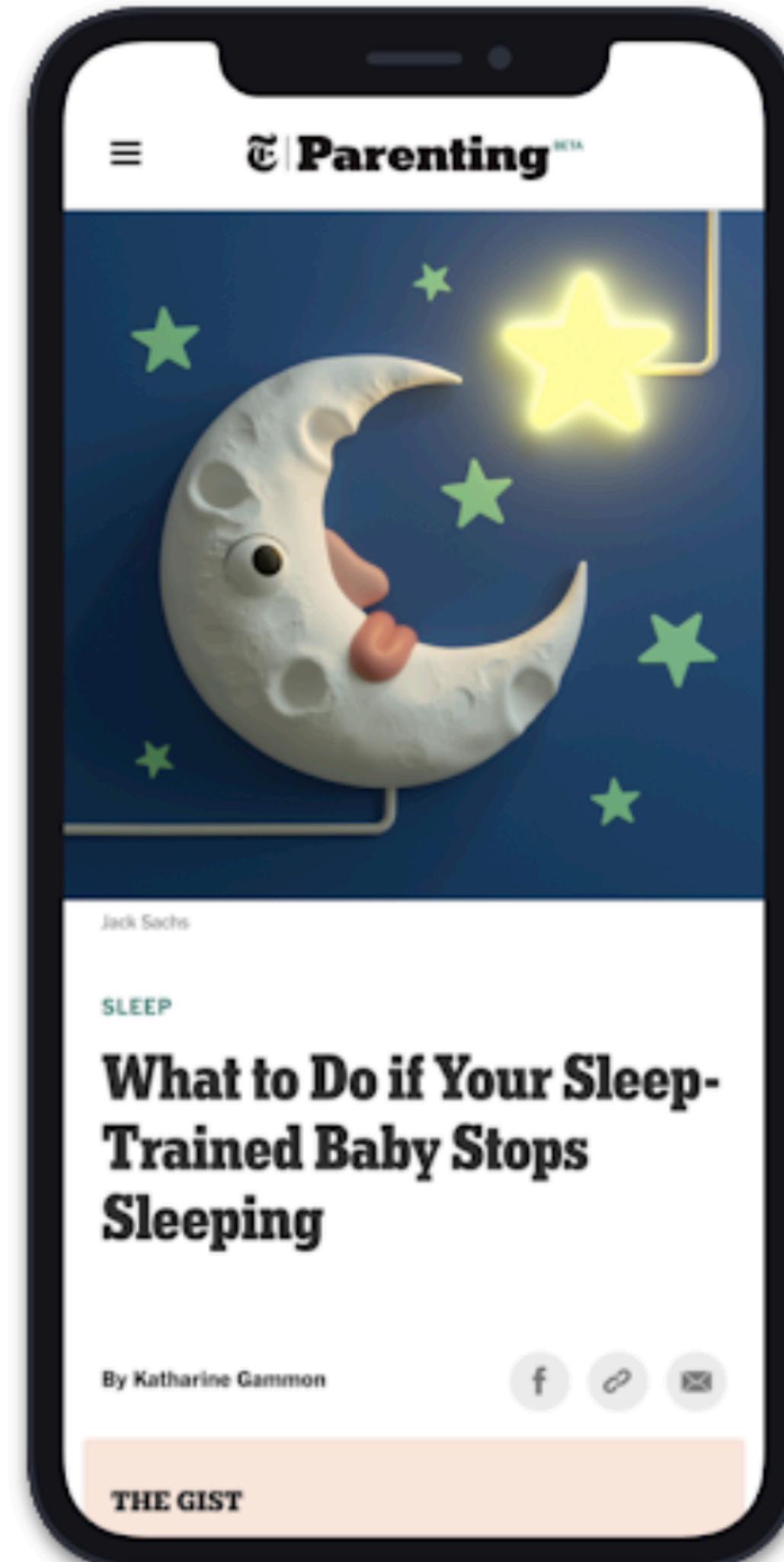
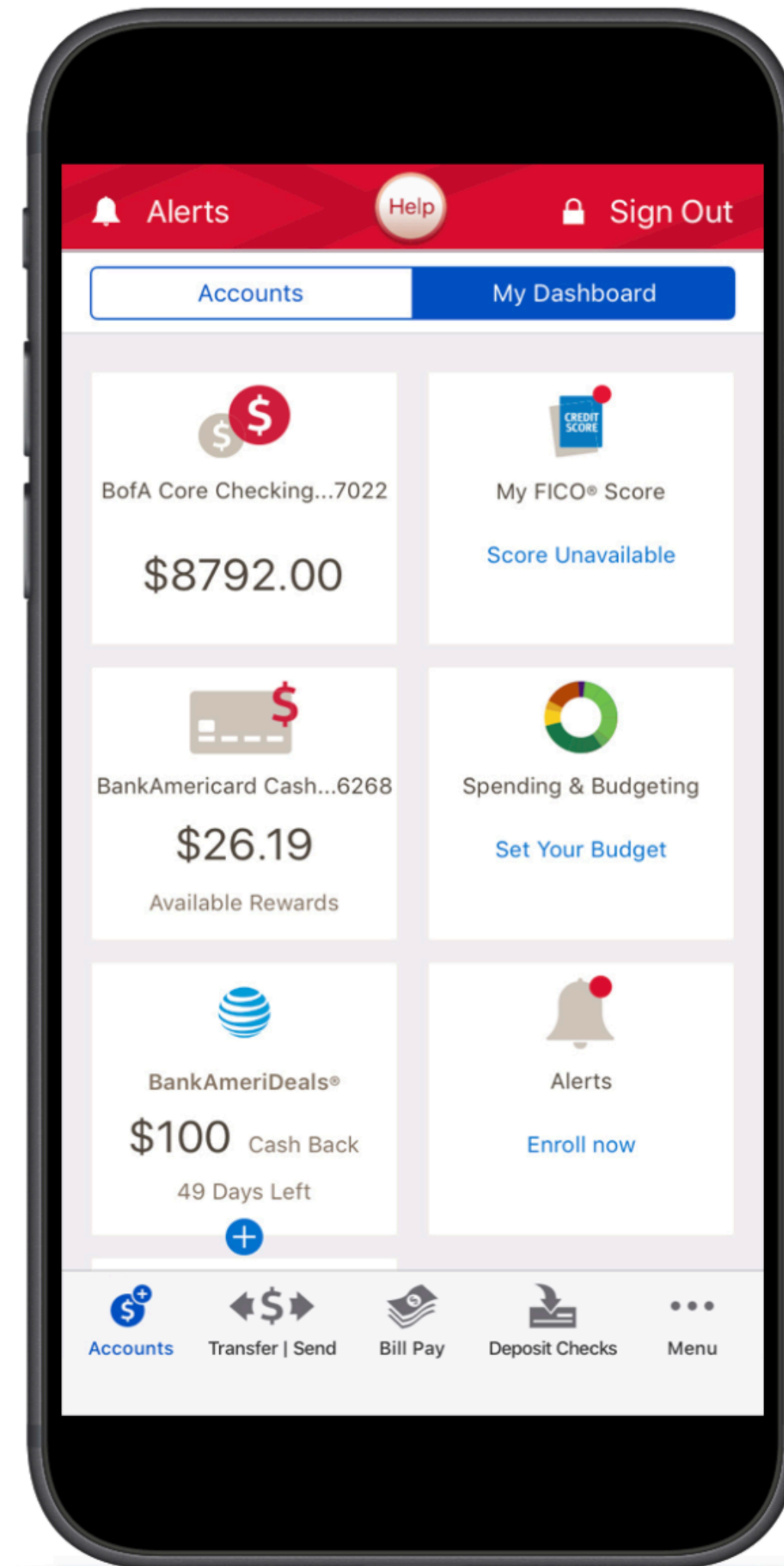
- 1. Customer Experience 2.0**
- 2. Liscio + Karbon**
- 3. Demo**
- 4. Where to start**
- 5. What's coming**



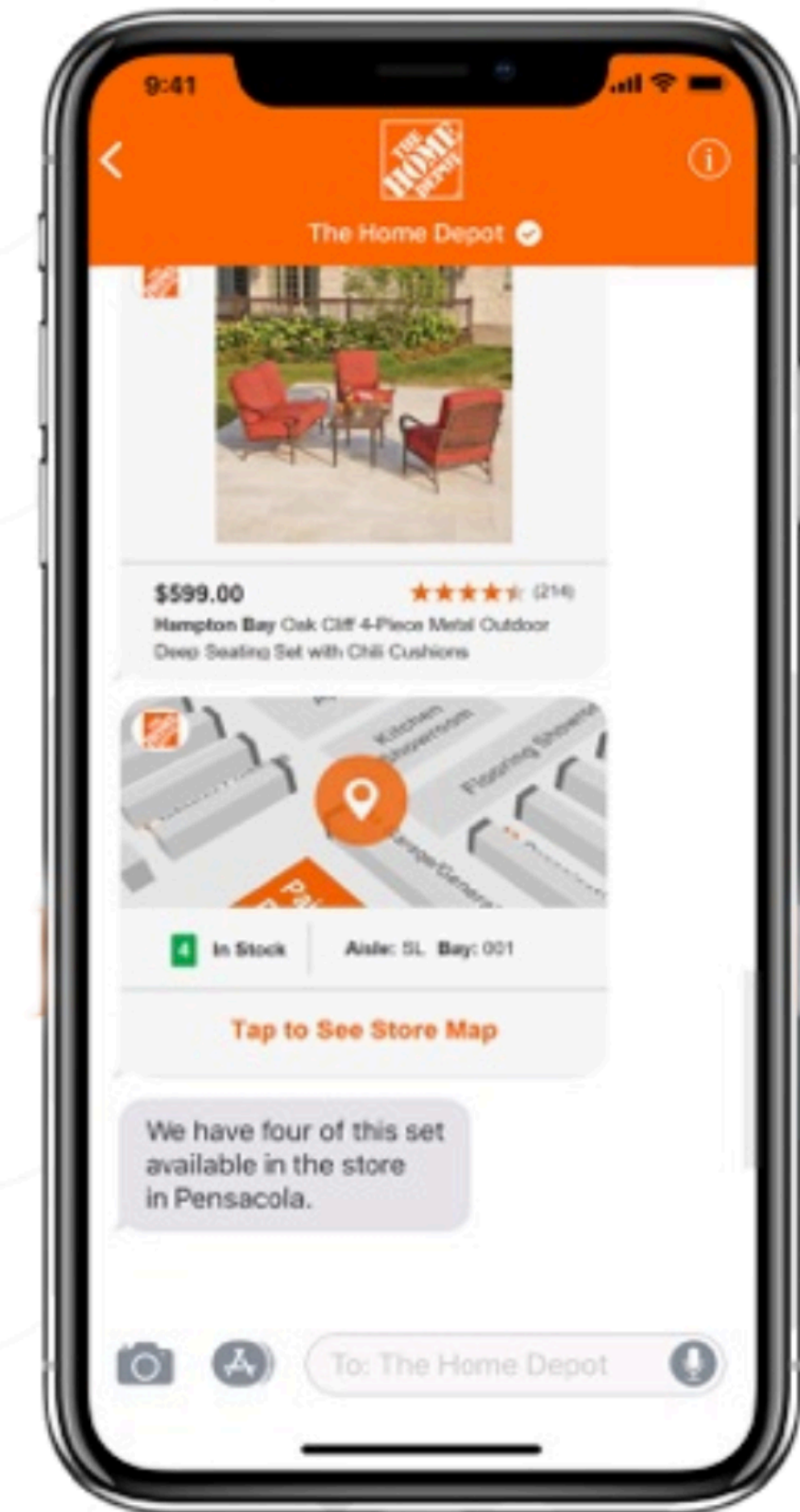
When relationships matter, how do firms deliver the same exceptional experience online?



Client Experience 2.0



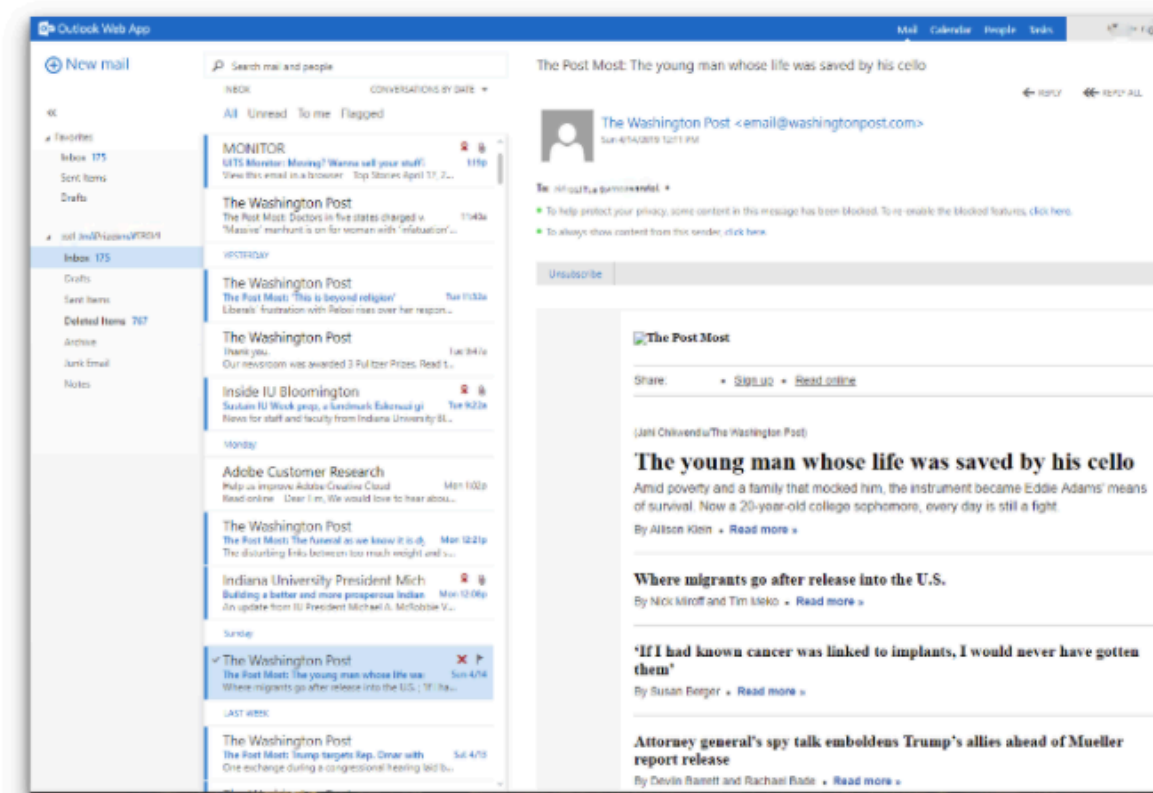
YOU CAN TEXT US
You can directly text message
The Home Depot Right from iOS iMessage



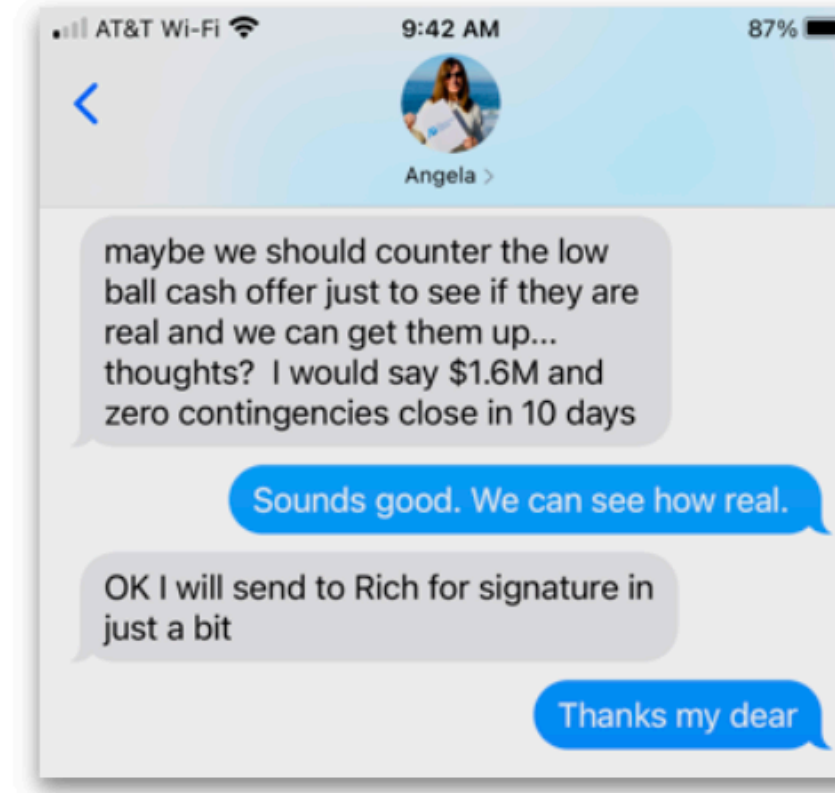


But most firms are here:

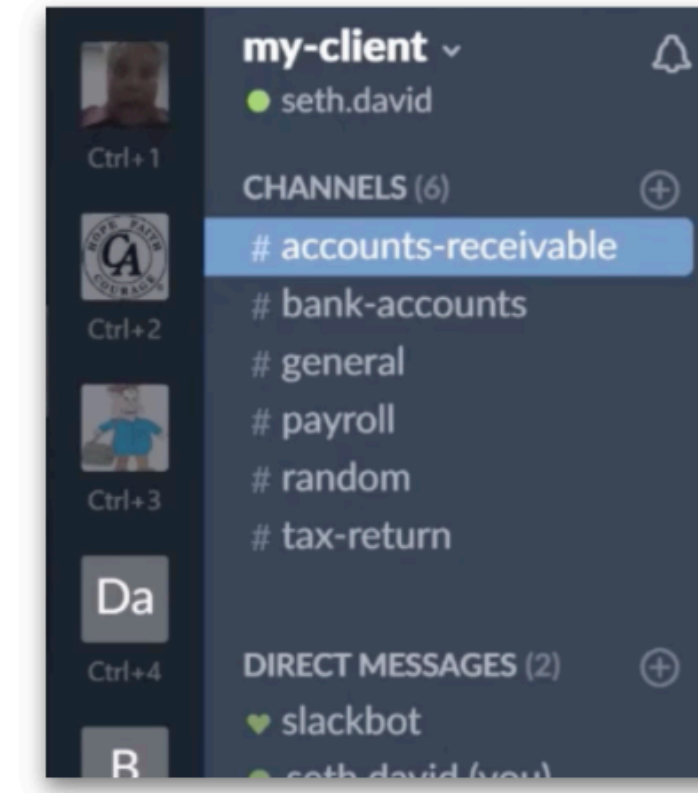
EMAIL



TEXT

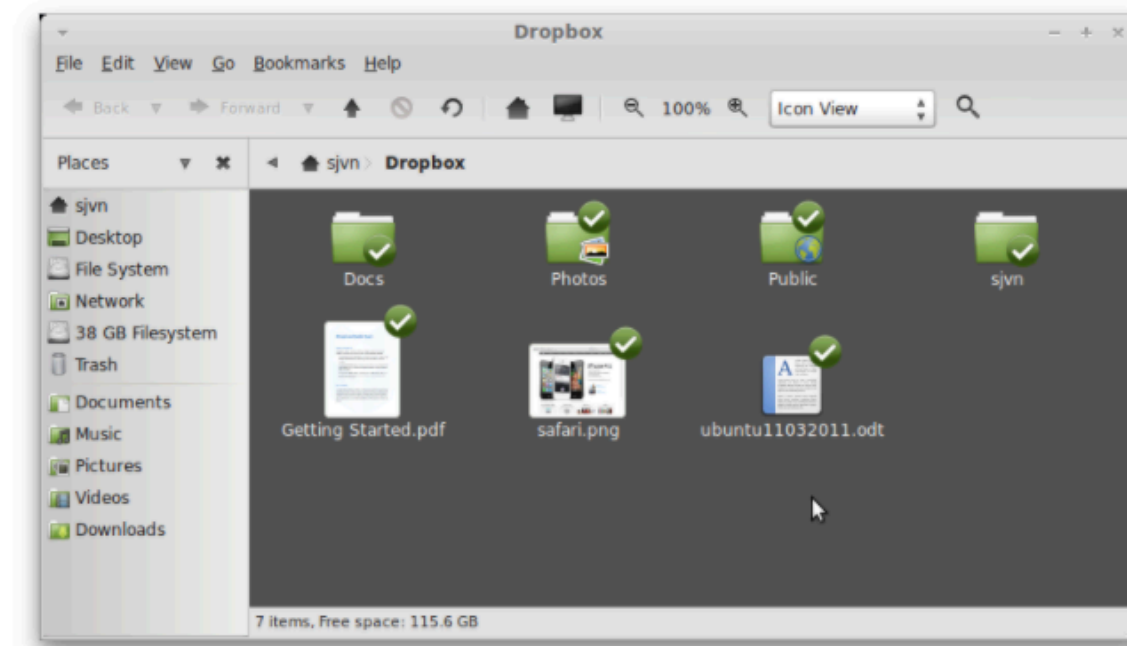


CHAT

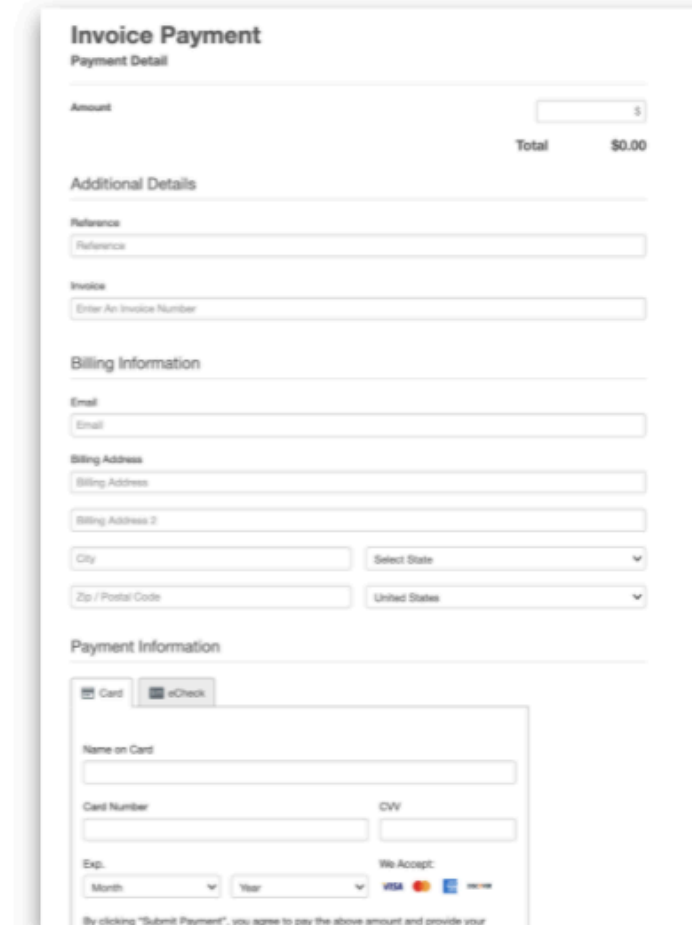


Chaotic
Siloed
Insecure
Inefficient

DOCUMENT SHARING



PAYMENTS



eSIGN

STATUS: COMPLETED			
Documents	Status	Title	Date
Out for signature	COMPLETED	Sponsor Adde...BER - Liscio	Mar 15
Awaiting my signature	COMPLETED	Liscio Offer Letter	Feb 24
Completed	COMPLETED	Sponsor Agre...H21 - Liscio	Dec 21 2020
Declined	COMPLETED	Sponsor Agre...sor - Liscio	Oct 19 2020
Templates	COMPLETED	Sponsorship ...ber - Liscio	Jul 31 2020
Template links	COMPLETED	SNH 2020 Spo...dum - Liscio	Apr 27 2020
Draft	COMPLETED	dsfdgf	Nov 8 2019
Team	COMPLETED	NDA for Dist...LC / SanAgro	Apr 24 2019
Integrations	COMPLETED	TotalSource ...ce Agreement	Mar 20 2019
	COMPLETED	TotalSource ...ce Agreement	Mar 19 2019
	COMPLETED	TotalSource ...ce Agreement	Mar 18 2019



A few lines you might have heard before:

I didn't check my email.

Do you have a mobile app?

I'd like to assist you but I'm not in the loop. Can you fill me in?

Can you resend the files?

Can I text you my social?

I'm cc'ing you so you have this for future reference.

The link you sent expired.

I'll have to wait till I'm in the office to scan those documents to you.

Where is that document? In email, text, the portal??

I can't login to the portal.

Can I text you a picture of the document?



And it is frustrating:





Liscio's Mission

Liscio's mission is to empower accounting firms of all sizes to put their clients first. By starting with the customer and delivering a secure mobile platform for them to exchange sensitive information with you, Liscio delights clients, increases engagement, and deepens their connection to the firm.
Client Experience 2.0™ begins with Liscio.



Myriah.pdf

Form	1040	Department of the Treasury—Internal Revenue Service	(99)	20
U.S. Individual Income Tax Return				

Filing Status ☐ Single ☐ Married filing jointly ☐ Married filing separately (MFJ)

Check only one box.
If you checked the MFS box, enter the name of spouse. If you checked the joint return box, enter the name of your dependent. ▶

Your first name and middle initial	Last name
If joint return, spouse's first name and middle initial	Last name

Home address (number and street). If you have a P.O. box, see instructions.

City, town or post office, state, and ZIP code. If you have a foreign address, also complete:

Foreign country name	Foreign province/state
----------------------	------------------------

Standard Deduction **Someone can claim:** ☐ You as a dependent ☐ Your spouse as a dependent
☐ Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness **You:** ☐ Were born before January 2, 1955 ☐ Are blind **Spouse:** ☐

Dependents (see instructions):

(1) First name	Last name	(2) Social security number

Standard Deduction for —

- Single or Married filing separately, \$12,200
- Married filing jointly or Qualifying widow(er), \$24,400
- Head of household, \$18,350
- If you checked any box under Standard Deduction, see instructions.

1	Wages, salaries, tips, etc. Attach Form(s) W-2	2a	
2a	Tax-exempt interest	3a	
3a	Qualified dividends	4a	
4a	IRA distributions	4c	
c	Pensions and annuities	5a	
5a	Social security benefits		
6	Capital gain or (loss). Attach Schedule D if required. If not required, enter -0-		
7a	Other income from Schedule 1, line 9		
b	Add lines 1, 2b, 3b, 4b, 4d, 5b, 6, and 7a. This is your total income .		
8a	Adjustments to income from Schedule 1, line 22		
b	Subtract line 8a from line 7b. This is your adjusted gross income .		
9	Standard deduction or itemized deductions (from Schedule A)		
10	Qualified business income deduction. Attach Form 8995 or Form 8995-E, if applicable.		
11a	Add lines 9 and 10		
b	Taxable income. Subtract line 11a from line 8b. If zero or less, enter -0-		

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions.

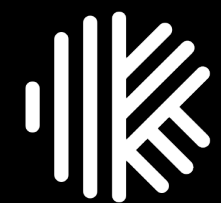


“ With Liscio, we were able to do 150 more tax returns in 2020 with no increase in staff and no overtime. ”



Janelle Pedulla, Owner
LongwoodCPA
Liscio User Since 2018

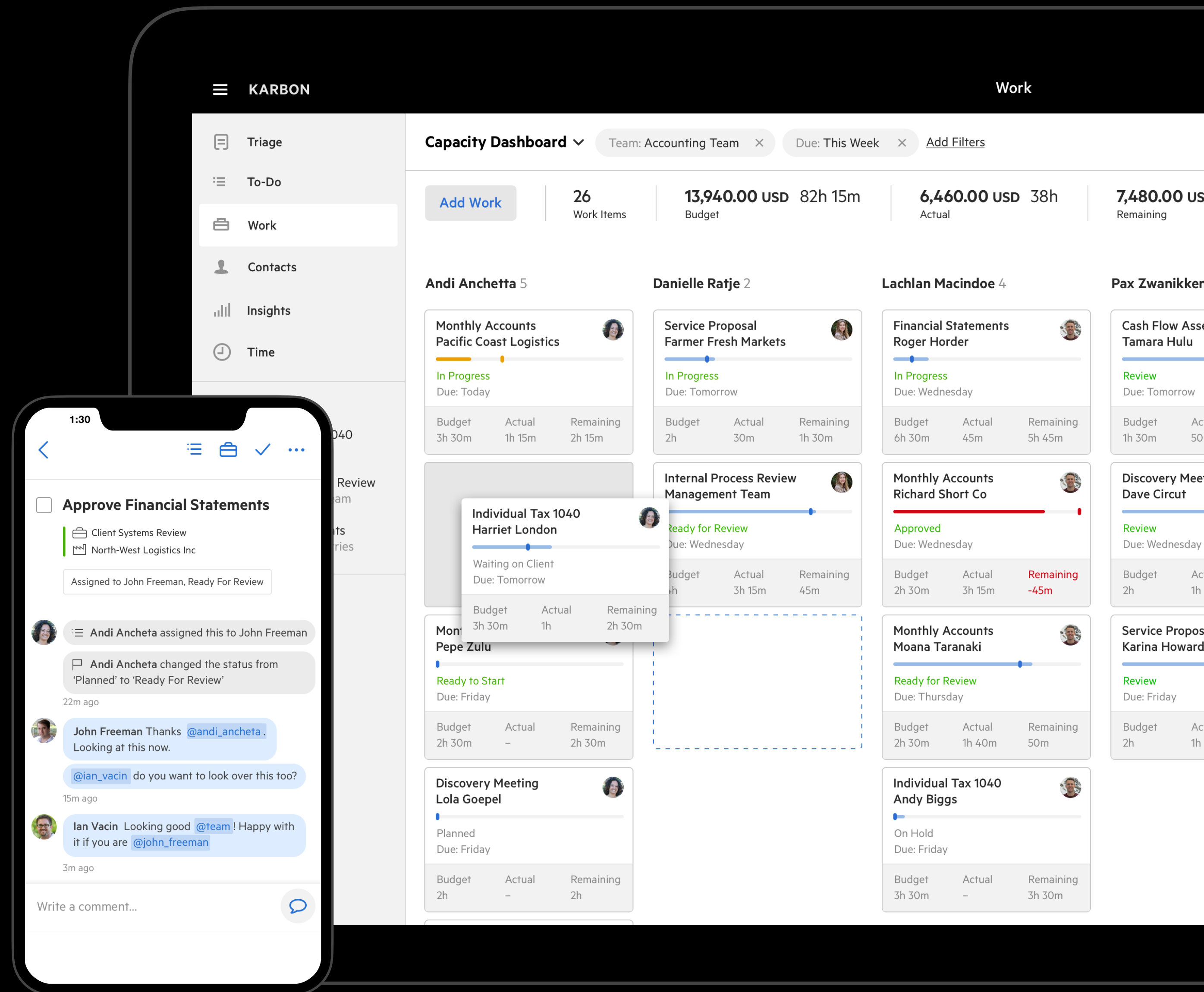
1. Customer Experience 2.0
2. Liscio + Karbon
3. Demo
4. Where to start
5. What's coming



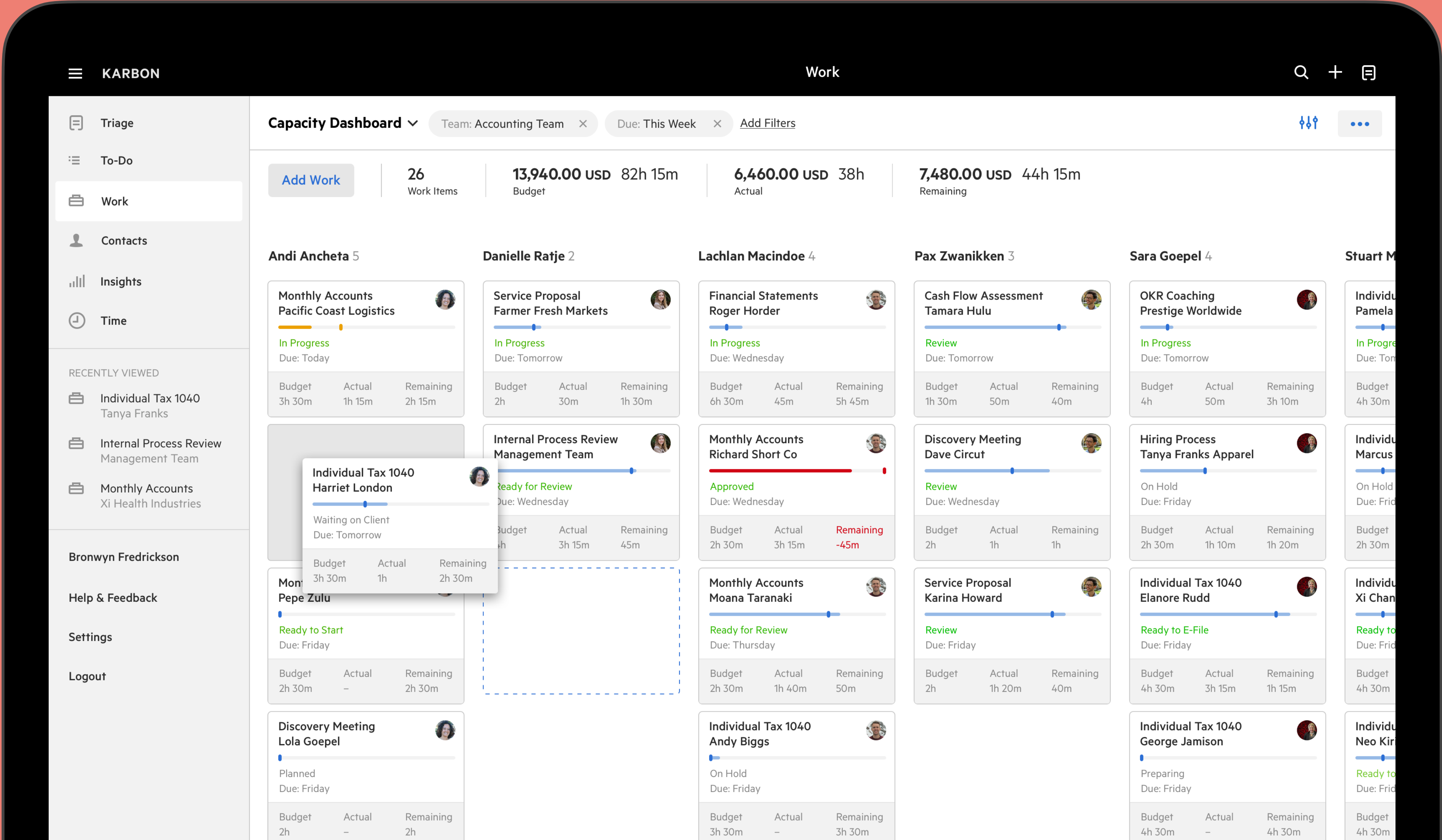
Work Management Software for Accounting Firms

karbonhq.com

GET STARTED

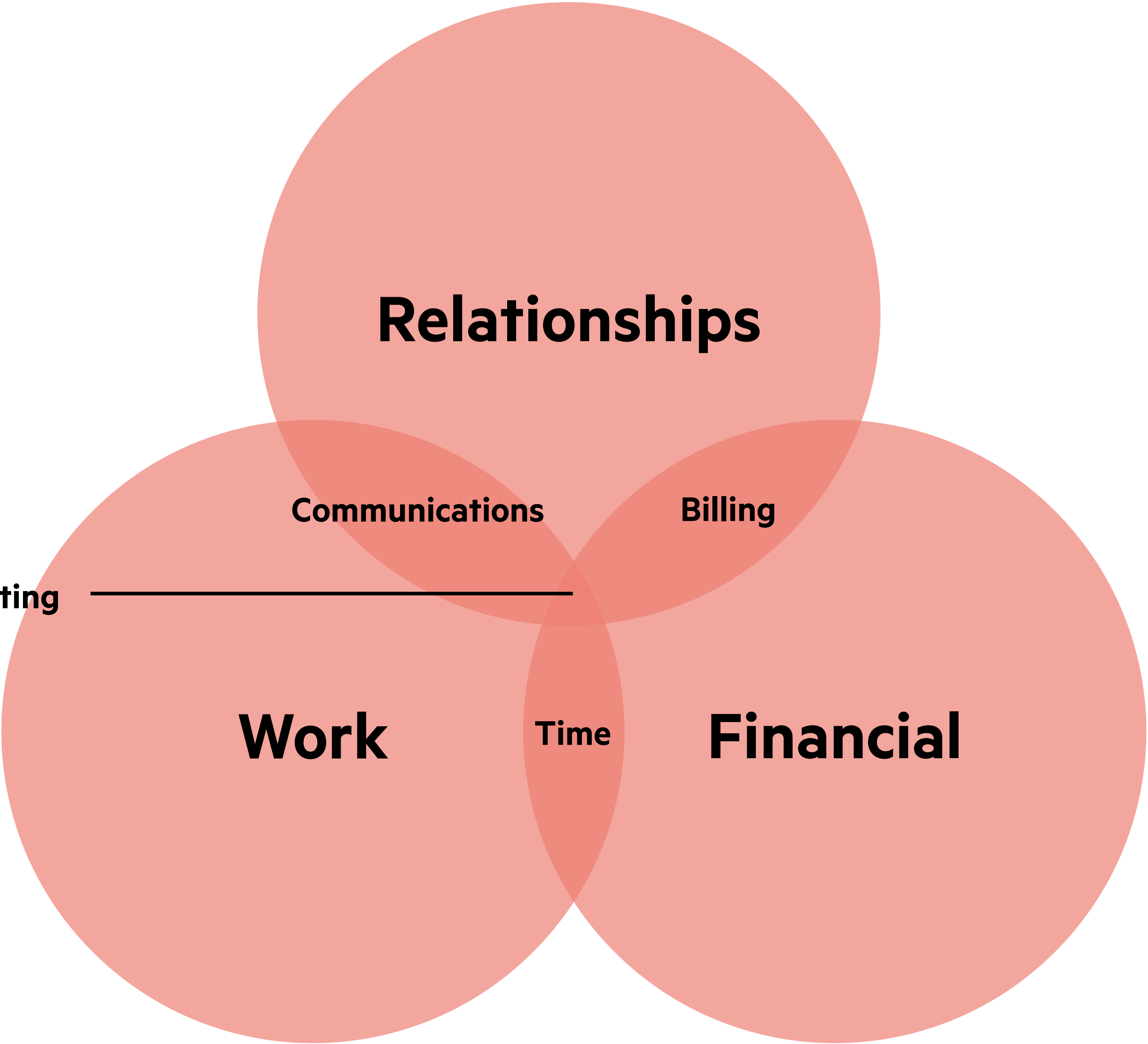


Gain unparalleled visibility over your team's work and progress.



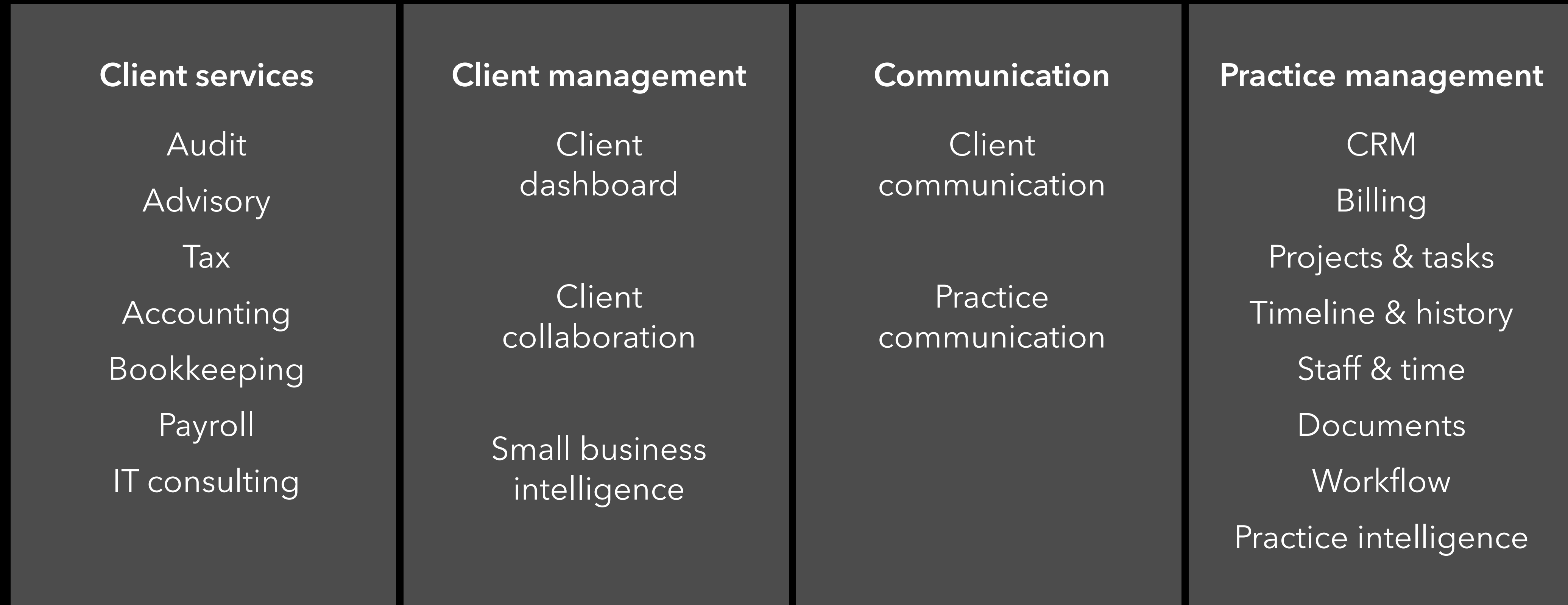
**Designing for single
source(s) of truth
within your practice**

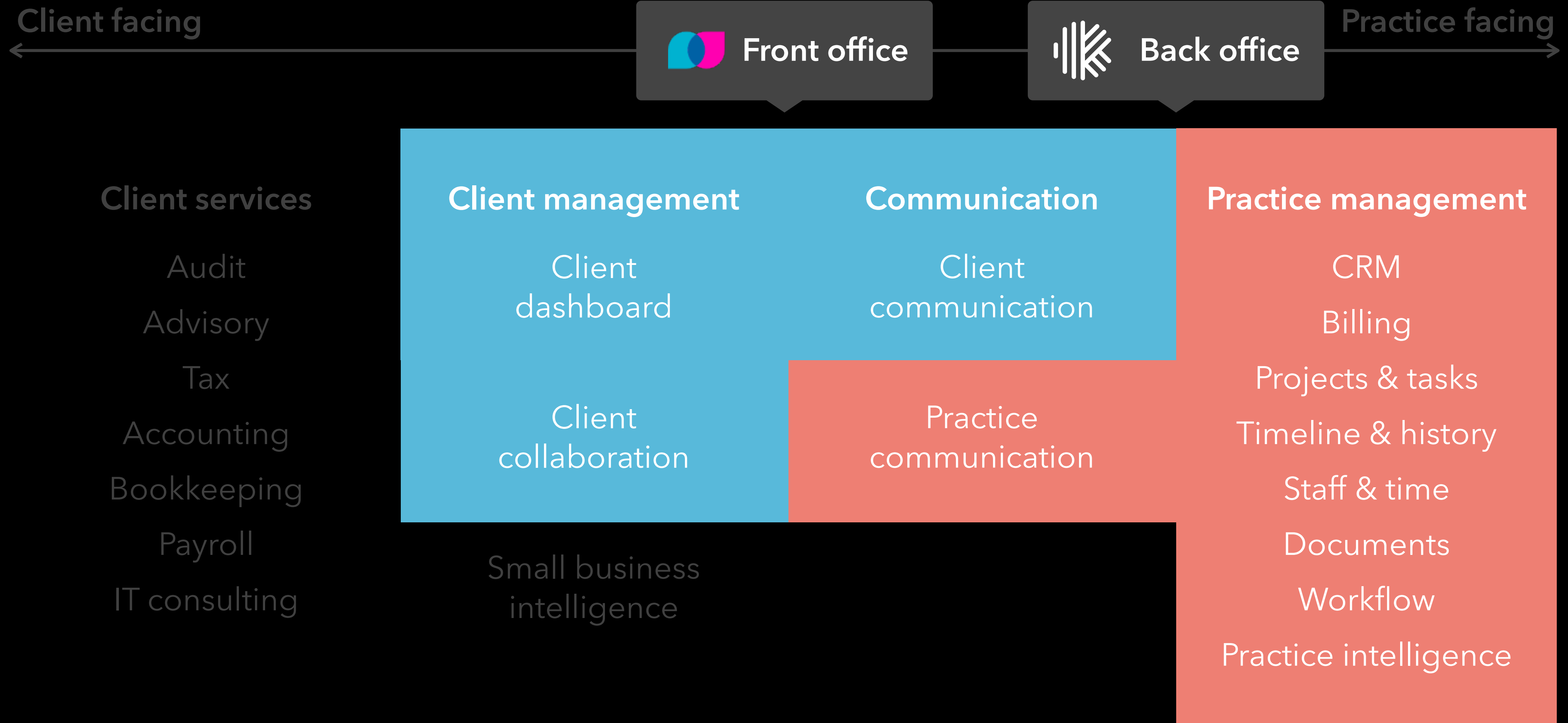
Documents & Reporting



Client facing

Practice facing





“I love the idea of frictionless. Clients will respond and communicate from Liscio while staff live in Karbon daily.”

— Andrew Wall, CPA, CMA; Managing Partner; CPA4IT Professional Corporation

1. Customer Experience 2.0
2. Liscio + Karbon
3. Demo
4. Where to start
5. What's coming

1. Customer Experience 2.0
2. Liscio + Karbon
3. Demo
4. Where to start
5. What's coming

Steps to get up and running

1. **Request:** Request the integration from support@karbonhq.com
2. **Keys:** Paste the Karbon provided API key into the Karbon synchronization tool in Liscio.
3. **Integrate:** Liscio will auto-match Organizations/Accounts and Contacts.
4. **Review:** Review the matched accounts for accuracy.
5. **Enjoy!**

1. **Customer Experience 2.0**
2. **Liscio + Karbon**
3. **Demo**
4. **Where to start**
5. **What's coming**



Your Digital Front Office

*All interactions between **client** and **staff***



Secure File Exchange



Client Tasks



eSignatures & KBA



Real-Time Messaging



Mobile App & Built-In Scanner



Text Notifications



File Delivery via Liscio Dispatch



Client-Side File Storage



KARBON

Workflow & Practice Management for Staff

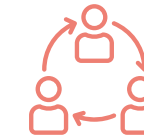
*Where the work of the **firm** gets done*



Workflow Automation



Project Management



Team Collaboration



Performance Analytics



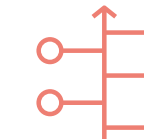
Centralized Knowledge



Work Templates



Time & Budget Tracking



Activity Timelines

Announcing Liscio + Karbon:

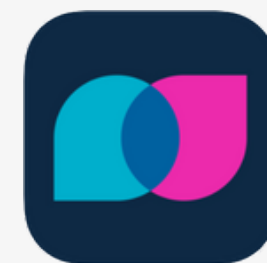
Flawless Client Experiences from 1st Conversation to Delivery of Work

1.

Creating a Contact or Account in Liscio will **auto-sync** the new record to Karbon (and vice versa).

2.

The integration has a **Matching Engine** that helps map Accounts/Contacts in Liscio to Organization/People in Karbon (*especially useful in cases where names aren't identical*).



+ Contact/Account



+ People/Org.



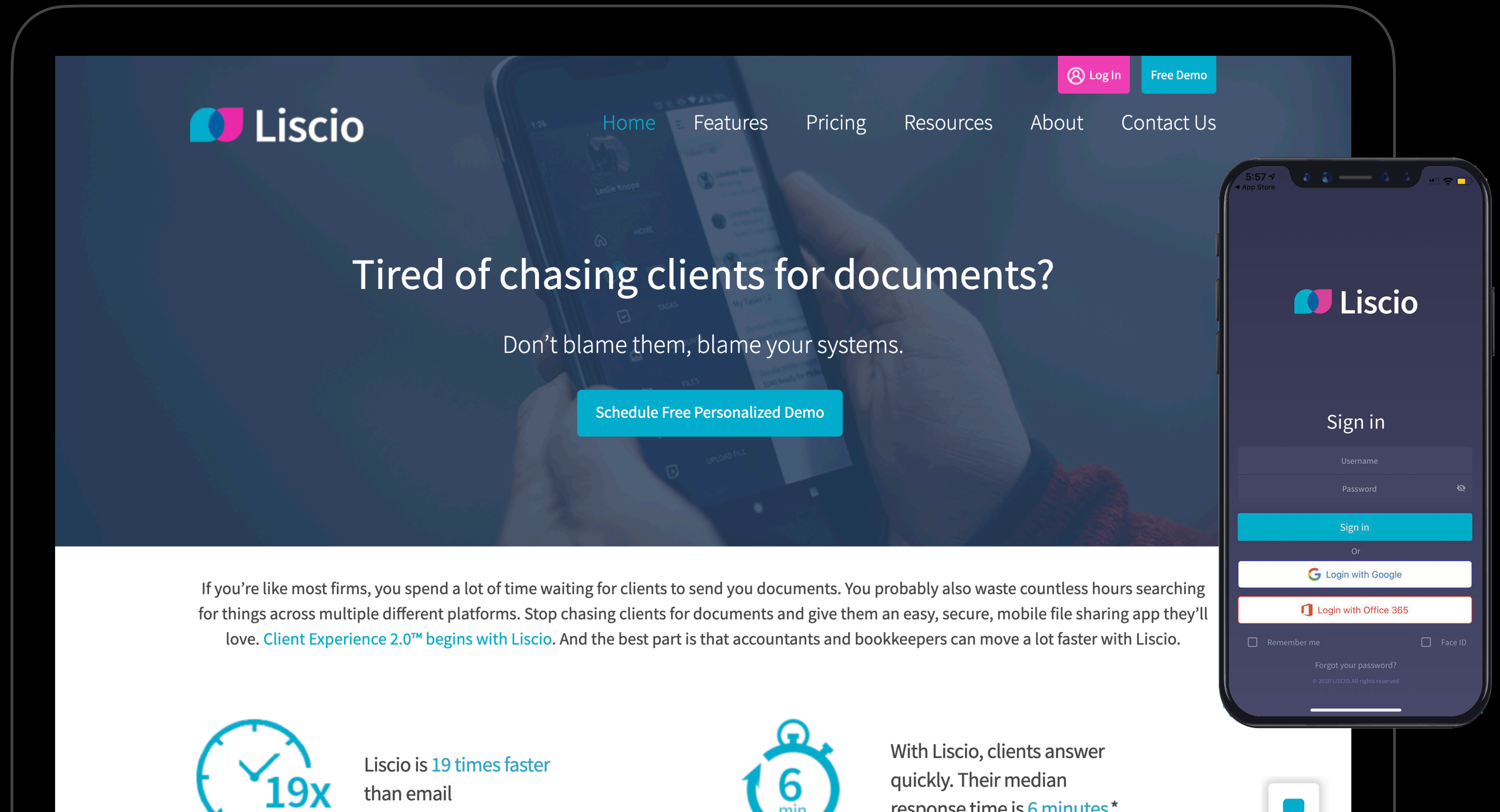
With Liscio + Karbon, you have a **single database** to manage all of your Client Contact information. You can meet clients where they are (mobile) so staff never have to chase for documents.

Friction disappears and everyone's **productivity and happiness levels increase**.
Less email, no portals, no data silos.

Wrap up

- 1. Customer Experience 2.0**
- 2. Liscio + Karbon**
- 3. Demo**
- 4. Where to start**
- 5. What's coming**

Client experience 2.0: liscio.me



The image shows a large tablet and a smartphone. The tablet displays the Liscio website, and the smartphone displays the Liscio mobile app login screen.

Liscio Website Header:

- Log In
- Free Demo
- Home
- Features
- Pricing
- Resources
- About
- Contact Us

Liscio Logo



Tired of chasing clients for documents?

Don't blame them, blame your systems.



[Schedule Free Personalized Demo](#)

If you're like most firms, you spend a lot of time waiting for clients to send you documents. You probably also waste countless hours searching for things across multiple different platforms. Stop chasing clients for documents and give them an easy, secure, mobile file sharing app they'll love. [Client Experience 2.0™ begins with Liscio](#). And the best part is that accountants and bookkeepers can move a lot faster with Liscio.

Performance Metrics:

-  Liscio is **19 times faster** than email
-  With Liscio, clients answer quickly. Their median response time is **6 minutes***

Liscio Mobile App Login Screen:

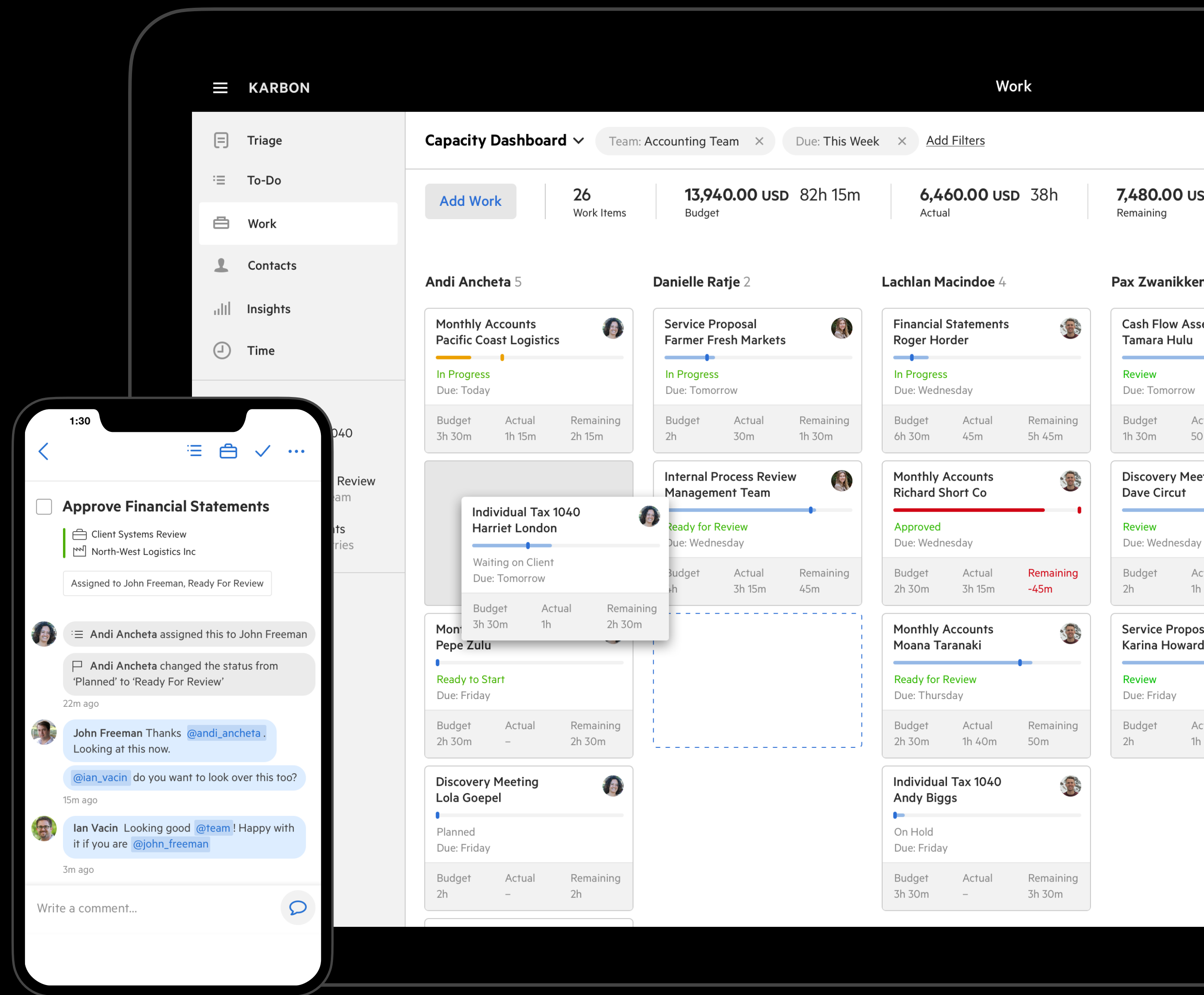
- Liscio**
- Sign in**
- Username
- Password
- Sign in**
- Or
-  [Login with Google](#)
-  [Login with Office 365](#)
- ☐ Remember me
- ☐ Face ID
- [Forgot your password?](#)
- © 2020 LISCIO. All rights reserved.



Work Management Software for Accounting Firms

karbonhq.com

GET STARTED

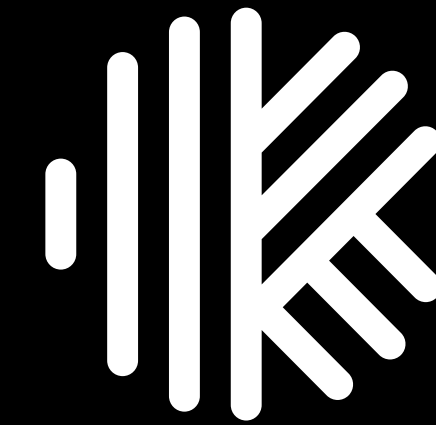


Questions?

Thank you!



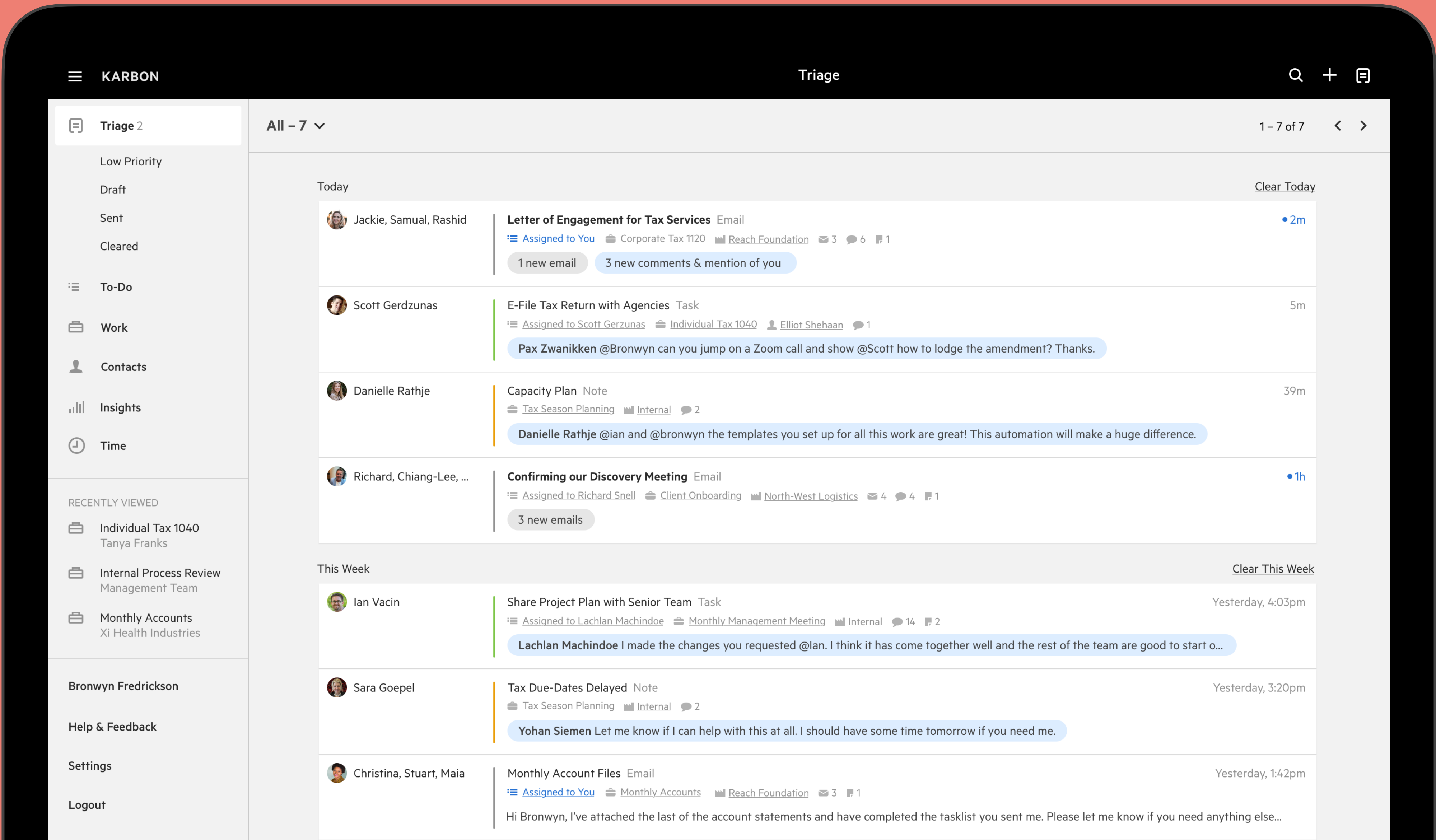
liscio.me
@LiscioCX
sales@liscio.me



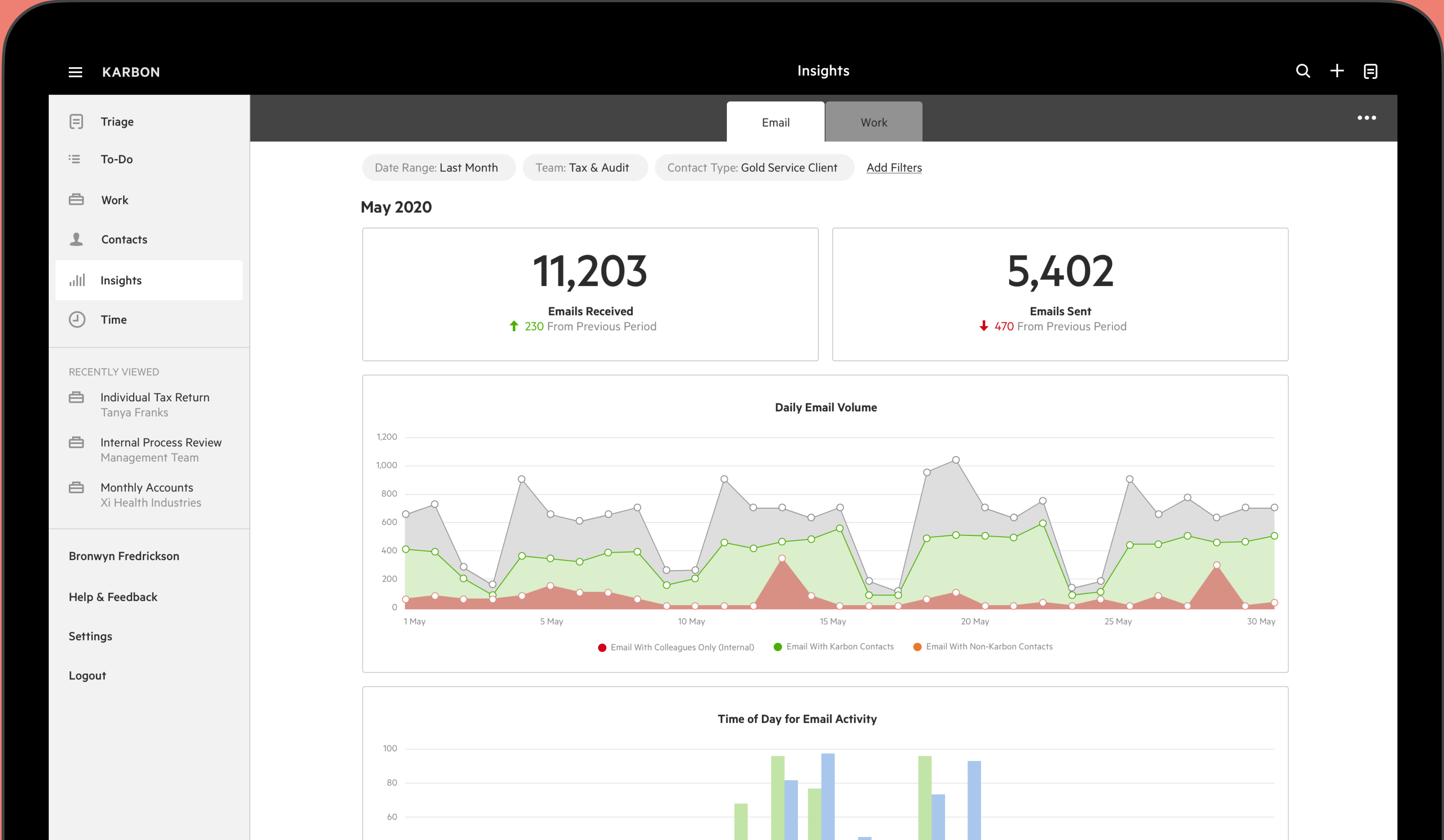
karbonhq.com
@KarbonHQ
ian@karbonhq.com

Appendix

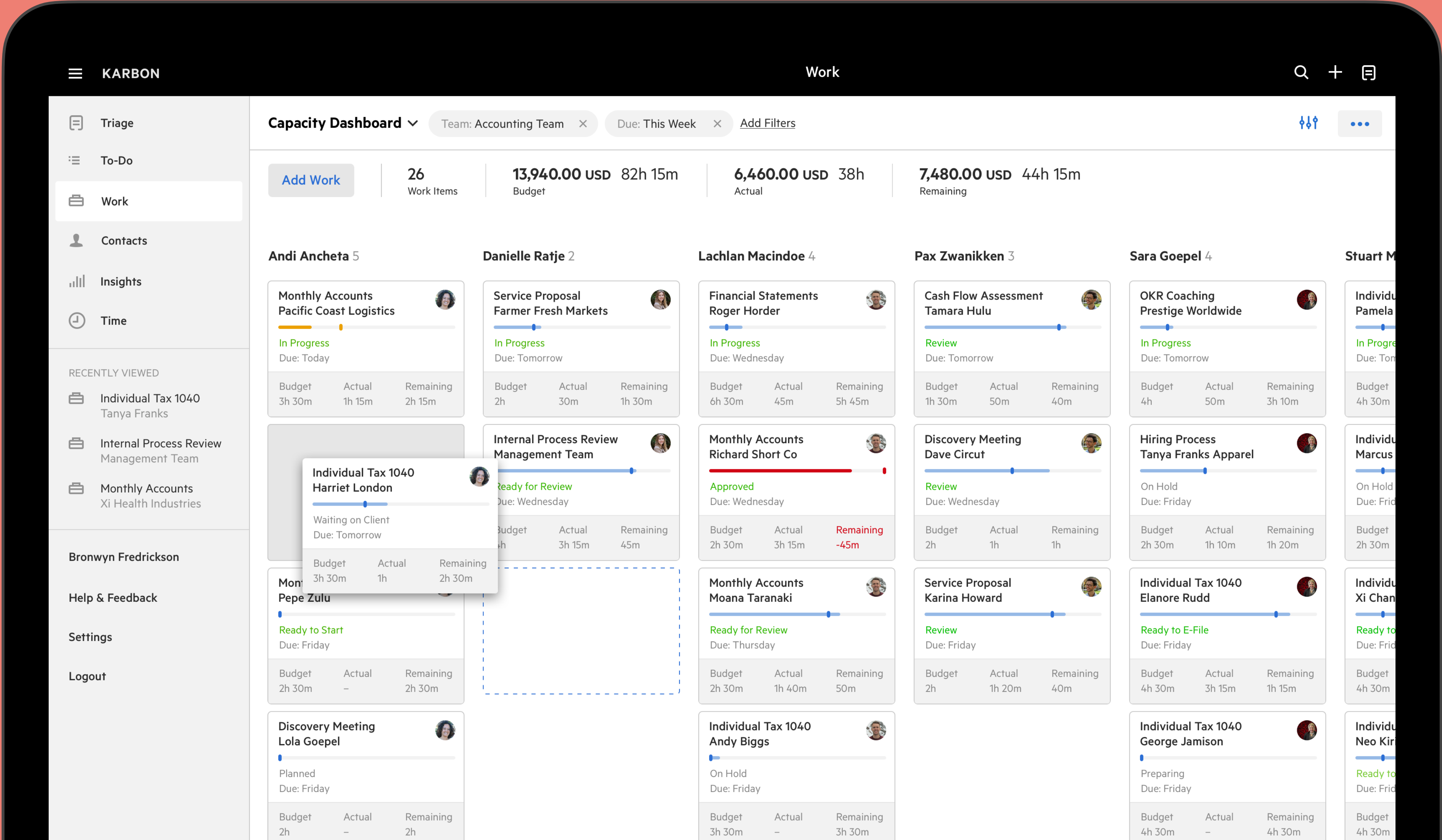
Break free from your inbox with email embedded in your workflow.



Visualize firm efficiency, output and KPIs to drive better behavior.



Gain unparalleled visibility over your team's work and progress.



Standardize repeatable processes with workflow templates.

