

TaxACT Enables Online Backup of Unlimited Returns

The TaxACT Preparer's 1040 Edition includes multi-preparer support, online file backup, file data logging and file protection features.

Benefits and Features

- **Online backup:** Enterprise Editions allow users to quickly and easily back up an unlimited number of client returns on the 2nd Story Software server, helping prevent data loss due to computer crashes, power outages or other problems.
- **Print and file unlimited returns,** with e-filing priced at only \$7.95 per federal return and \$3.95 for states. Volume discounts are available.
- **Form 2848** provides the necessary documentation for Power of Attorney.
- **Security logging** enables users to track and review client returns, helping reduce error and providing preparers insight into all changes made to a return.
- **ReturnSafe:** Enterprise Editions prevent others from making changes to the returns users have opened, adding an extra level of security to the preparation process.
- **An enhanced mailing label feature** enables users to print labels, simplifying the process of sending data organizers to clients.

What Users Say

"It's a very easy program to understand; it's very easy to maneuver around in it. The interview process uses questions in layman's language, which is very convenient," said **George Monroe, of GDCTM LLC.**

Summary

TaxACT 2008 Preparer's 1040 Edition contains all the preparation tools and features that tax professionals want and appreciate.

2nd Story Software/TaxACT
www.taxact.com
800-573-4287

TaxACT

ATX Offers 10,000+ Forms, Automatic Data Transfer

ATX provides the widest array of forms in the industry, with more than 10,000 in the program. Its selection goes beyond the standard return types.

Benefits and Features

- **Automatically transfer K-1 information** from 1041, 1065 and 1120S returns to K-1 input worksheets using a new menu item called Import K-1 Data.
- **Mask sensitive client data,** such as Social Security Numbers and bank account information, with a series of Xs when printing client copies. This feature has been added to the privacy tab of program preferences.
- **Adjust 4th-quarter estimate voucher due dates** with the Client Letter Wizard.
- **Enter lone spaces or lone decimal points** in fields. To help minimize erroneous e-file rejections, the program automatically deletes these entries in numeric fields.

What Users Say

"When I first bought it, I really hadn't had much experience with computers or hardware," said eight-year user **Richard Erickson of Richard H. Erickson & Associates, Inc.** "The price was right, and I could understand it. Now the flow of information is much better than it was seven or eight years ago, particularly with the state forms. The input forms are much easier to understand this year. This really reduces the time I need to spend on any return. The ease of use for e-filing is tremendous."

Summary

ATX provides a program that meets the needs of small firms that don't have a lot of money to spend on software.

CCH Small Firm Services/ATX
www.atxinc.com
888-455-0183

ATX

TaxWise Audit Shield Insures Returns for 3 Years

The TaxWise Power package includes unlimited e-filing and no network fees for additional users in the same office. The package also includes toll-free customer support in English and Spanish, free orientation sessions for new users and access to the CCH U.S. Master Tax Guide Online.

Benefits and Features

- **The 1040 package** includes Form 5405, First-Time Homebuyer Credit; and 1040 Worksheet 5, Recovery Rebate Credit Worksheet, with support for electronic filing of exempt organization returns, including Form 990, Form 990-EZ and Form 990-PF.
- **Toggle between English and Spanish** on over 70 forms.
- **7216:** Disclosure forms required by Federal law to permit taxpayers to give consent before any tax return information is provided.
- **Audit Shield for Nonbank Products** allows all eligible e-filed returns to be protected with Audit Shield, not just those with a bank product. Audit Shield is an extended warranty program, which qualifying tax professionals can offer their clients. The service reimburses the taxpayer for certain penalties, interest or additional taxes up to \$2,500 on a qualifying return for up to 3 years.
- **TaxWise Explorer's wide format** displays tax return information horizontally rather than split up.

What Users Say

"I like TaxWise because it is very user-friendly. It shows you right where any errors are. It had all the features that I wanted. The support people were quick and friendly when I called. They were very knowledgeable about the product and responded quickly to any questions that I had ..." said **Stacey Avery of One Tax Man Atlanta Avery, Inc.**

Summary

From its inception 23 years ago, TaxWise has specialized in seamless electronic filing and integration with the refund loan and transfer products that are so important to tax preparation professionals.

CCH Small Firm Services/TaxWise

www.taxwise.com

888-455-0184

TaxWise[®]

Drake's Tax Return Archive Saves Multiple Drafts

With more than 30 years of experience and a programming staff that includes CPAs and EAs, Drake provides more than 30,000 tax professionals tools for a successful tax season.

Benefits and Features

- **Trial balance import** imports data directly to the return.
- **A tax return archive** saves multiple scenarios and drafts of returns.
- **W-2 Import** automatically imports W-2s from major employers such as McDonald's and Wal-Mart (additional fees apply).
- **Improved tax comparison screen** displays details for itemized deductions, taxes, etc., enabling you to compare them with the previous year.
- **Compliance checklists** cover the new IRS rules.
- **Schedule B dividend income (1099-DIV) and Interest Income (1099-INT):** Dividend/interest screen automatically handles foreign tax credit.

What Users Say

"One of my favorite features of Drake Software is the customer service. It is outstanding. With my previous software, I'd wait an hour to an hour and a half for someone to get online. Then, they couldn't speak English, and it would take hours or days to even get an answer. Since I've been using Drake, I don't think I've waited more than three telephone rings to speak to a live person ..." said **Robert Darrell, of Robert K. Darrell CPA.**

Summary

Drake Software includes the following: federal and all state programs (individual and business), unlimited e-filing, a document manager, a multi-office manager, bank software, an appointment scheduler, amortization and fixed asset programs and free online training.

Drake Software

www.drakesoftware.com

800-890-9500



ProSystem fx Tax Handles Federal, State Returns

More than two-thirds of top CPA firms use ProSystem fx Tax, the tax compliance and preparation software from CCH, according to CCH, a Wolters Kluwer business.

Benefits and Features

- **A diagnostic system** tests for omissions and inconsistencies and allows you to jump back to related input.
- **Comprehensive state programs** for all entities include multi-state capabilities.
- **A client and tax return management system** provides the status of returns and staff responsibilities.
- **A security feature** enables firms to block Social Security Numbers on returns completed offshore.
- **Intuitive navigation panels**, pop-up menus, and "forms-stepping" features facilitate quick navigation.
- **An onscreen review system** features color-coded tick marks, field and global notes, lists, overrides and estimates.

What Users Say

"ProSystem fx Practice Management is tried and true. It's the workhorse we rely on every day across the firm to complete timesheets, do our invoicing and handle our collections and receivables," said **Mike Boger, of Breslow Starling Frost Warner Boger Hiatt**.

"This year we have seen a marked functionality across the suite of programs. That is a reflection that the programmers and the beta testers have gotten the kinks out before the product hit the street ... " said **Jim Sharvin, Sobul Primes & Schenkel**.

Summary

ProSystem fx Tax handles all types of federal and state returns and offers extensive electronic filing services. Tax preparation firms can increase productivity with the security features and easy accessibility of Global fx, which enables firms to use offshore tax preparers.

CCH, a Wolters Kluwer business/ProSystem fx Tax
www.cchgroup.com
800-739-9998



TaxWorks Provides 'Find By' Option in Invoice Settings

TaxWorks has been in the tax preparation business for 37 years. Started in 1972 as a service bureau by Warren Bates, TaxWorks began marketing in-house software for professional preparers throughout the country in 1986. The company now offers an entire library of tax programs as well as paperless office storage solutions.

Benefits and Features

- **Optimized client selection screen** is faster.
- **An enhanced revision history**, located in the Secure Area of the TaxWorks website, details each update to the program, how it affects the program, and the date it was added to your program.
- **Features include** a link from the scheduler program to the organizers, a "find by" option in the invoice settings and the ability to add alpha characters in phone number inputs (e.g. 1-800-TAX-PREP).
- **A security option** allows access to returns by Social Security Number/Employer Identification Number.

What Users Say

"TaxWorks software is easy to use. It gently guides me through complicated situations. TaxWorks support is like having office support staff ready and willing whenever I need them," said **Nedra Quick of Nedra Quick Tax & Accounting**.

"I'm very impressed with TaxWorks, especially the speed of input and the tax calculation time. Also, the PUP system makes it possible to do state and fiduciary returns," said **William Stopps of William E. Stopps CPA**.

Summary

In addition to improved program speed, the the 2008 TaxWorks program includes a link from the scheduler program to the organizers, a "find by" feature in the invoice settings and the ability to add alpha characters in firm phone number inputs.

TaxWorks
www.taxworks.com
800-765-7777



