

Honest Feedback from Real Users of Tax Suites Software



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How Suite It Is: Top 5 Tax/Write Up Suites

The best solutions make your practices more effective

Let the Business Manage the Software

Software may be the backbone of tax preparation, but it is not the nerve center. The best solutions on the market, therefore, make your practices more effective, but they do not try to replace the expertise nascent in your organization. It can be tempting to find a tax suite with copious functionality; much of it may help your team to prepare more returns with a higher degree of accuracy. The true test of a tax suite, though, is the extent to which it makes your team better. The solution should enable your team to produce; it should not preempt their skills.

Everything in One Place

A full tax suite should offer everything that a preparer will need within a few mouse clicks. The software should offer the forms and features necessary to complete individual, corporate and fiduciary returns—as well as others—for all the states for which you prepare tax returns. In addition to the tools of tax preparation, practice management should not be overlooked. When preparing returns, forgetting to complete a form can be as problematic as entering the data or performing the calculations incorrectly. Task lists, office workflow and robust reporting keep track of the business of tax preparation as well as the data that winds up on the forms. A comprehensive tax suite thus should be a single source of information and the primary means of execution.

Start to Finish

Regardless of the type of return, the tax preparation process starts when the appointment is made. A tax suite should keep the preparer informed throughout the process, delivering appointment and calendar information, client notes and previous years' returns quickly and with minimal searching. The effort should be applied to preparing an accurate return rather than the administrative overhead that can appear to dominate the client service process. Effective software will streamline the tax preparation process with timely information that is easy to access. When a practitioner opens the tax suite, applying tax expertise should be intuitive; the software should help the expert put his knowledge to work.

A tax suite should be the accountant's complete toolbox, consisting of the wrenches, screwdrivers and hammers needed to construct a tax return of any type. For complex clients, these tools should work in an integrated fashion to create multiple returns of different types. One day, you may need to build a 1040 and an 1120 for a small business owner, while on another the plan may call for a 1041 as well. When selecting a tax suite for your office, think about your clients and the services that you provide to them. Then, choose the toolbox with the right mix for the jobs you do most often.

Research Network Integrates Tax Returns Through Client Relate

“The system diagnoses itself by checking the return and questions if something doesn’t look right, and gives you an error message.”

CCH’s ProSystem *fx* Tax handles all types of federal and state returns, offers extensive electronic filing services, helps users work smarter and increases productivity.

Benefits and Features

- OCR technology allows users to import W-2 information from ProSystem *fx* Scan.
- A new special allocation capability will be added for all Schedule M-3 line items on the 1065 return.

What Users Say

“ProSystem *fx* is the Mercedes of tax programs,” says **Michael Parmet**, managing partner of Parmet, Chapman & Madsen, P.C., CPAs in Houston, Texas. “We have very sophisticated issues, including depletion calculations for oil and gas clients; ProSystem *fx* handles these well.” Parmet subscribes to the Tax Research Network, which integrates with his tax returns through Client Relate. “CCH sends us an email with information about legislation, elections, credits or refund opportunities that could affect our clients. Using criteria provided by Client Relate, our tax returns are searched, clients with whom the change is relevant are identified and a letter is generated. We modify the letter and send it out.”

Glenn Adams, managing partner of Adams and Hook, CPAs, LLP in Bessemer City, N. C., uses the enhanced, Internet-based Tax Suite Global *fx*. “I don’t have to keep up with versions because every update is already online.” Adams is confident about the security of his clients’ information. “Global *fx* is a secure server – more secure than I can make it in my office. The system diagnoses itself by checking the return, questions if something doesn’t look right and gives you an error message. You audit the return yourself before you send it to the IRS.”

Summary

ProSystem *fx* Tax integrates seamlessly with all components of ProSystem *fx* Office with Individual, Partnership, Corporation, Deferred Compensation and many other modules.

CCH, a Wolters Kluwer business

www.tax.cchgroup.com

888-224-7377



Fast Tax Preparation With High-Volume Practices

“Comprehensive forms, speedy return preparation and unlimited e-filing”

TaxWise software focuses on ease-of-use and fast tax preparation for tax professionals with high-volume practices, particularly those offering refund related bank products to their clients. The user interface emulates the actual forms while prompting the user to provide additional information related to the refund process and electronic filing. Finally, the program’s extensive diagnostics use color-coding to tell the preparer when information required for electronic filing is missing.

Benefits and Features

- TaxWise is fast and easy to use, with expert help and diagnostics that enable speedy yet accurate tax preparation.
- Works with all leading refund banks so professionals can use bank partner of their choice rather than one chosen for them.
- Offers online solutions, including an interview-based program that allows non-professionals to assist taxpayers in preparing and e-filing their returns.
- Toll-free live support from U.S.-based customer service representatives is included free, with extended hours during tax season and 7/24 online support.
- Free online training in using the program is available at TaxWise University.
- Postal codes and employer identification numbers pre-populate applicable fields.

What Users Say

“Absolutely love it. So user friendly and have not had to look at the instructions for years. They have kept it simple on how to use things and consistent throughout the years,” says **Diane Beverly** of Beverly and Bucker Inc. located in Virginia.

Summary

TaxWise makes professionals more productive, with both individual and business software that is easy to master. A clean screen design and pre-populating data reduces the data entry burden while reducing errors. Powerful client tracking and reporting tools help professionals manage their practice, particularly in high-volume environments.

CCH Small Firm Services

www.taxwise.com

800-755-9473

TaxWise

Power Packages Drives Growing Tax Practicest

“More than 10,000 federal, state and local forms plus expert research.”

The ATX Total Tax Office provides an incredibly comprehensive software suite for the tax and accounting professional. With more than 10,000 calculating forms, ATX tax software was recently ranked No. 1 for scope of forms in an AICPA member survey. And this huge form set is supported by Kleinrock and CCH research materials, including U.S. Master Tax guide, Quick Answers library, Federal and All-States TaxExpert Suite and semi-monthly Federal Tax Bulletin.

Benefits and Features

- ATX is intuitive and easy to use, with input screens identical to the actual federal and state forms and direct links to all of the supporting forms and worksheets.
- The tax software integrates directly with the research products for quick, line-by-line support and answers that saves time and increases productivity.
- Free online training in using the program is available at ATX University.
- ATX offers attractively priced CPE credits for both online and live seminars.
- Program updates are downloaded and installed automatically with the click of a mouse.
- Toll-free live support from U.S.-based customer service representatives is included free with extended hours during tax season and 7/24 online support.

What Users Say

“I have used the ATX suite for the 2005 and 2006 filing seasons as my tax return source. I have been extremely pleased with the ease of use and speed to go from one form to another. The list of available forms is unbelievable,” says Dennis Diebolt of Diebolt & Associates PC located in Michigan, “As long as ATX continues to make their product, I will be a customer forever!”

Summary

ATX offers a variety of value-priced solutions, with easy to use and install software that’s both intuitive and comprehensive backed by world-class support and training that’s responsive to the needs of small tax and accounting firms.

CCH Small Firm Services

www.atxinc.com
877-728-9776



Ability To Import From QuickBooks

“The learning curve was minimal and the program very easy to navigate, even for our new staff straight out of college.”

Lacerte Tax software is designed to help increase an accounting firm’s productivity by providing comprehensive, high-performance tax return preparation for single-user or network environments.

Benefits and Features

- Natural workflow design.
- Sophisticated diagnostics and extensive error checking.
- Tax practice management.
- Convenient, reliable and guaranteed eFiling.

What Users Say

Elizabeth Alexander, a CPA who prepares tax returns and consults in Arlington, Texas, says, “The ability to import from QuickBooks is huge.” Since Alexander has an IT background, she comments, “I get pretty snitty about tech support, but with Lacerte, I have had ‘zero’ bad experiences.”

Darren Neuschwander, a shareholder and CPA with Neuschwander, Faircloth & Hardy, P.C., in Robertsdale, Ala., has used Lacerte Tax since 2002. “The learning curve was minimal and the program very easy to navigate, even for our new staff straight out of college.” The combination of using Lacerte Tax and Lacerte DMS allowed his firm to become paperless. “The tax product is superior. However, I wish Intuit would cater to a CPA firm and provide more seamless integration to us.”

“The primary benefit of Lacerte is that it has everything – all states, all types of returns – and is relatively easy to use,” says **Bryce Forney, CPA**, of Forney Accountancy Corporation in Pleasant Hill, Calif. “One downside is that it does not provide any insight about how to fill out certain forms and what’s common. I need it to inform me and educate me as I go.”

Summary

The complete suite of tax offerings is anchored by the Lacerte tax program, designed to maximize productivity by following the natural flow of the tax return.

Lacerte

www.lacertesoftware.com
800-765-7777



Barcode Scans Speed Processing

“The same returns are processed electronically and stored in the file cabinet program; clients have access to their returns through a secure portal.”

UltraTax CS enables firms to fully streamline their entire tax practice, from initial client data collection to e-filing tax returns. Fully integrated with the entire CS Professional Suite, UltraTax CS enables firms to perform more work in less time, enhance client services and increase the number of clients without adding staff.

Benefits and Features

- UltraTax CS is organized in a logical file format so users are never more than one or two mouse clicks or keystrokes from any part of the return.
- UltraTax CS 1040 Portals offer clients electronic copies of their individual tax returns within secure, password-protected portals.

What Users Say

“Integration is the primary reason we switched,” reports **Jason Lawhorn**, Operations principal with Lawhorn & Associates, PLLC, a Knoxville, Tenn. firm that was already using Write-Up CS. “When you take those steps for integration, CS Accounting and UltraTax, at the minimum, you’re saving time by importing information into the return. It’s fantastic. Some of our clients now use the web-organizer through a secure portal. They enter all of their information, attach source documents and we get an email when they’re done. Through this system, 85 percent of the data entry is done. We just compare and make sure we agree with what is in there, and in 10 minutes, we’re done.”

“The one thing about accountants is that they don’t invest in their software,” says **Sean Manning** of Manning & Company, PC. “With Thomson, some of the features tremendously outweigh the cost. Instead of printing 800 organizers, 50 percent of the Littleton, Colo.-firm’s clients receive it by email. “The same returns are processed electronically and stored in the file cabinet program. Clients have access to their returns through a secure portal.”

Summary

UltraTax CS provides a new barcode scanning utility that allows firms to scan codes on 1065, 1120S, and 1041 Schedule K-1s, and barcodes on W2s for preparation of tax returns.

Thomson Tax & Accounting

www.cs.thomson.com
800-968-8900



Import From QuickBooks Peachtree or Client Checkbook Program

“Client Write-Up with Payroll offers complete and powerful accounting tools.”

Client Write-Up is designed to help accountants work faster whether they enter data heads-down or import from third-party general ledger programs such as QuickBooks® or Peachtree® or from the available Client Checkbook program.

The Payroll module lets accountants offer complete, professional payroll services including direct deposit and MICR printing. Checks posted to Payroll automatically update Client Write-Up, eliminating duplicate data entry. Federal, state and municipal compliance reports are quick and easy.

Benefits and Features

- Seamlessly integrated with your client’s data and with your tax return software.
- Create standard and custom financial reports.
- Includes integrated live and after-the-fact payroll so you can offer the broadest range of services to your clients.

What Users Say

“I can get a lot more done for a reasonable cost,” says **Mark Rampanelli**, enrolled agent at Saltcay Enterprise, Inc. in Selven, N.Y. “I had used another program that was module based. By using a forms-based program, I just drop the information where it is supposed to go. I open the worksheet and follow the worksheet just like by hand,” he reports. “We did have a learning curve. We went through the training module that they had at TaxWise University.”

“I had (computer) problems the last week of tax season, reports **Dr. James Greve** of Doctor Tax, Inc. in Owosso, Mich. How does he rate ATX technical support? “They were super.”

Summary

Client Write-Up lets users quickly create polished, professional financial statements using templates or customizable layouts. The program includes all GAAP required statements and more. After-the-fact-payroll has never been easier. Enter check stub information into the check register, and Client Write-Up automatically updates employee and vendor records.

Client Write-Up CCH Small Firm Services

www.taxise.com
800-755-9473

TaxWise®