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Mary Girsch-Bock • Aug. 27, 2018



Intuit ProSeries Tax

<https://proconnect.intuit.com/proseries/>

From the 2018 reviews of professional tax preparation systems.

ProSeries Tax from Intuit is best suited for small to mid-sized accounting firms that primarily prepare individual 1040's though the product does offer the option to

process business returns as well. ProSeries Tax is available in two editions: Basic and

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data, the in-product search capability that allows users to search the online knowledgebase for information, and users can choose to use the form entry option or the data sheet view Keyboard shortcuts are also available, and the Basic edition of ProSeries Tax offers guided workflow capability – a wizard that helps users maximize the number of deductions their clients can take. A Tax Planner feature available in the Professional version of the application allows users to offer clients add-on tax planning services, and both editions offer the ability to download source documents from client financial institutions as well as the ability for clients to pay their invoice directly from their refund.

ProSeries Tax supports more than 3,600 forms and schedules, including 1040 returns, unlimited individual returns for all necessary states, unlimited Federal and State Business returns, including forms 1120, 1120S, 1065, 1041, 990 and unlimited Gift and State Returns (706 and 709).

ProSeries Tax supports complete e-file capability, with an unlimited e-filing option available for those that process a larger number of returns, as well as the option to e-file returns for the current year as well as two years prior.

Intuit Link, included with ProSeries Tax, is a secure, online portal that provides both firms and clients with a secure way to share documents. The portal is custom branded for the firm, and offers a variety of useful features including the ability to set up automated client reminders, custom email templates for client communication, and the ability to invite clients to sign up for Intuit Link at no cost. Users can also create questionnaires in Link, and their clients can easily share documents in Link via direct upload or mobile upload, or by simply scanning the documents into Link.

ProSeries Tax Professional edition offers seamless integration with QuickBooks applications, along with a variety of other add-on options including the Client Organizer, which allows users to carry forward prior year totals as well as create

blank organizers for new clients. The client organizer also works to reduce the

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ProSeries Tax, which can be used to import financial data such as forms 1099-B, 1099-INT, and 1099-DIV directly into ProSeries, eliminating the need to collect that information clients, while also serving to reduce paperwork. Users can also create and email an encrypted PDF file of the client's return directly to the client, with client provided with an automatically generated password that will allow them to access the return.

ProSeries Tax offers good help options including field and form specific help options, FAQ's, a detailed user guide, as well as access to product videos and training options. Telephone, email, and chat support is available in ProSeries Tax, with product support included in the subscription cost.

Well-suited for small to mid-sized firms that process anywhere from a few to a few thousand returns, ProSeries Tax offers a variety of pricing options that are designed to suit just about any firm. The product is currently offered in both Basic and Professional versions, with the Basic version handling individual returns only. The 1040 Complete edition of ProSeries Tax runs \$1,849 per year, with pricing per form available for those processing business forms as well. Other Professional options include a Pay-Per Return option and the brand new Choice 200, for firms that process less than 200 forms annually, with pricing available upon request.

2018 Overall Rating: 4.5 Stars

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