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Mary Girsch-Bock • Aug. 27, 2018



MyTAXPrepOffice

Advanced Tax Solutions

www.mytaxprepoffice.com

From the 2018 reviews of professional tax preparation systems.

MyTAXPrepOffice from Advanced Tax Solutions is a good fit for tax preparers that process a high number of uncomplicated individual and business returns while offering free, unlimited federal and state e-filing. MyTAXPrepOffice is an online application that works with all common operating systems including Windows, iOS and Android, with users able to access the application from their desktop PC, Mac,

laptop, smartphone or tablet. The product offers an offline mode, so users can still

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the recently added Interview Mode, which guides staff through the necessary questions including personal, dependent, daycare, ACA, and income/deduction questions. If a return is not fully completed, it will appear on the dashboard as an in-process return.

MyTAXPrepOffice supports all federal 1040 forms and corresponding schedules, including all states the require filing. The product uses color coding throughout the data entry process, and also supports multi-state preparation and filing. Corporate and partnership returns are also supported including forms 1120, 1120s, 1065, 1041, and 990 forms and schedules. The Toolbox option on the home dashboard offers a variety of resources for tax preparers including a client letter, client organizers, access to an invoice report, as well as the ability to download a signature app for easy electronic form signing.

MyTAXPrepOffice includes unlimited federal and state e-filing capability, with all e-filed returns easily tracked, providing users with totals of both accepted and rejected e-filed forms.

Designed to process a high number of returns quickly, the 2018 version of MyTAXPrepOffice will include a new Client Portal allowing tax preparers to securely exchange and share documents with their clients and collect signatures remotely. This eliminates the need for the tax preparer and the tax payer to meet to get documents signed. The Signature Pad app is also included in all versions of the application, and the product also offers unlimited system storage.

Completely integrated, MyTAXPrepOffice offers excellent integration capability with a variety of financial products including PTPG, Navigator, EPS, Refund Advantage, and Santa Barbara Tax Products Group. All versions of the product offer unlimited tax preparation capability, free, unlimited e-filing and both federal and state filing, with at least one integrated bank product available in each version. Mentioned

earlier, the Signature Pad App is available in all product editions, and multi-office

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also available if necessary, and telephone support is available as well.

MyTAXPrepOffice is best suited for high-volume firms that process relatively straight-forward returns. MyTAXPrepOffice is available in three editions: Individual, which is \$495 and only handles 1040 processing for a single user; Essential, which runs \$795.00 and offers both individual and business return processing while supporting two system users; and Unlimited, which is \$1,095 and includes Multi-Office Management capability and supports an unlimited number of system users. All versions include unlimited tax preparation. MyTAXPrepOffice offers a Lifetime Price Guarantee for early renewal. The above plans are not available for customers residing in Connecticut, Illinois, Maine, or New York, but MyTAXPrepOffice offers a special plan for tax preparers in these states.

2018 Rating – 4.5

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