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**Mary Girsch-Bock** • Aug. 27, 2018



### **TaxAct Professional Editions**

[www.taxact.com/professional](http://www.taxact.com/professional)

**From the 2018 reviews of professional tax preparation systems.**

TaxAct Professional Edition is well suited for small to mid-sized firms and tax preparers that handle a high number of 1040 forms. Previously geared towards individuals, TaxAct Professional now offers a variety of options for both 1040 and business form preparation and filing. TaxAct is also available for individuals looking to prepare their own taxes.

TaxAct Professional can be installed on desktop or workstation computers, as well as on a network, where the product can be shared. Users can also opt to install the product as an online network, though the online option is only available in the Enterprise editions of TaxAct Professional. Those using TaxAct Professional in prior

years can import data from the previous year or import data from another tax

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payment information. TaxAct Professional also includes TaxTutor, which informs users about tax law changes, and the product offers a What-If scenario for preparing various tax options for clients.

For firms that only file 1040 forms, either the 1040 Bundle or the 1040 Enterprise Bundle are suitable options, which include both federal and state 1040 filing, while those that process business forms will want to look at the other bundles, which file 1041, 1065, 1120, 1120S, and 990 federal forms, and 1041, 1065, 1120, and 1120S state filing for all states.

All TaxAct Bundles include unlimited e-filing capability, with all four bundles offering unlimited 1040 e-filing capability, while the Complete Bundle and the Complete Enterprise Bundle offering both unlimited 1040 e-filing and unlimited business form e-filing capability.

TaxAct Professional integrates with the optional Client Xchange portal, that allows firms and clients to exchange documents via the portal from any device. The Client Xchange supports an unlimited number of clients and documents, and easily handles a variety of document types including Microsoft Excel, Word, and CSV files, PDFs, and receipt images. Users simply invite their clients to sign up for the application, with the ability to share documents once the client is registered.

The Professional Enterprise Editions of TaxAct Professional include a Document Manager feature that allows users to save everything from tax forms and their supporting financial documents, to notes and other client correspondence. All documents are securely encrypted, and users can easily access any document through the Document Manager feature. Optional cloud storage is also available, so firms can securely store all firm data on the cloud, with easy access from anywhere with an Internet connection.

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TaxAct Professional offers solid system help, with users able to access the support page from anywhere in the application. Support options include a Getting Started feature, a Setup Guide, and access to all help topics. The help feature is completely searchable, so users can just enter a search term or phrase to access help for that particular topic. Both product and tax support options are available via phone or email, with extended support available during tax season. All product support is included in the cost of the software.

TaxAct Professional is an excellent fit for smaller firms that process a high number of 1040 returns for clients. TaxAct Professional is available via several bundles: the 1040 Bundle, which is \$600 per year for one user; the 1040 Enterprise Bundle, which is \$675 for unlimited users; the Complete Bundle for \$1,125 for one user, which offers business returns as well as 1040 form processing; and the Complete Enterprise Bundle, for any number of users for \$1,450 per year. All TaxAct Bundles offer unlimited e-filing capability, and the Enterprise editions of TaxAct Professional include cloud storage options, data backup, and document manager functionality. The Client Xchange module is also available at an additional cost. Pay-per-return versions are available for lower volume users

## 2018 Rating: 4.5 Stars

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