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simultaneously, e-filing availability, and the ability to import data from other applications.

**Mary Girsch-Bock** • Jun. 11, 2019



Say what you will about the Tax Cuts and Jobs Act (TCJA), but its passage certainly helped convince CPAs and tax professionals that having a solid tax compliance system is essential. The TCJA, as we all know by now, included the most sweeping changes in the U.S. Tax Code in more than 30 years, including the elimination of the personal exemption, a new cap on property and personal income tax deductions, and the elimination of moving expenses, just to name a few. Tax brackets changed across the board, and the new regulations also included significant changes for sole proprietors who file a Schedule C, with changes for LLCs, Partnerships, and Corporations included as well.

But it's not over yet. With many taxpayers filing for an extension, and with the tax

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However, these tax compliance systems do much more than offer form preparation shortcuts. In many cases, they offer line-by-line assistance, while offering complete integration with frequently used tax applications. They can also offer advance research options in order to handle more complex tax issues. For the sake of both convenience and security, many of the products included in the review also offer a secure portal, where clients and CPA firms can securely share the necessary documents needed in order to prepare taxes in a timely fashion.

As always, we have divided the Tax Compliance reviews into two categories: Advanced Workflow and Traditional Workflow. Many smaller firms consistently rely on traditional workflow systems while larger firms require the advanced features found in these applications. We have also provided a chart that provides our readers with a quick summary of features found in each of the reviews products.

The products reviewed in this issue are:

### **Traditional Workflow Systems**

[ATX – Wolters Kluwer](#)

[Drake Tax](#)

[Intuit ProConnect Tax Online](#)

[Intuit ProSeries Tax](#)

[TaxAct Professional](#)

[MyTaxPrep Office](#)

[TaxSlayer Pro](#)

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[CCH ProSystem \*fx\* Tax from Wolters Kluwer](#)

## **Related Products**

[Bloomberg 706 Preparer](#)

[Bloomberg 709 Preparer](#)

[Canopy Tax](#)

[TaxFyle](#)

[Gagnon Tax](#)

Throughout the review process, we looked at numerous system features and functions including cloud/remote access, the ability to support multiple tax preparers simultaneously, e-filing availability, and the ability to import data from other applications. We also looked at the availability of diagnostic tools to help firms locate and correct any potential issues prior to filing.

With all of the changes posed by the TCJA, having the tools and resources at your fingertips is more important than ever, for both your firm and your clients. If your firm is in the market for a new Tax Compliance application, this issue is a good place to begin your search.

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