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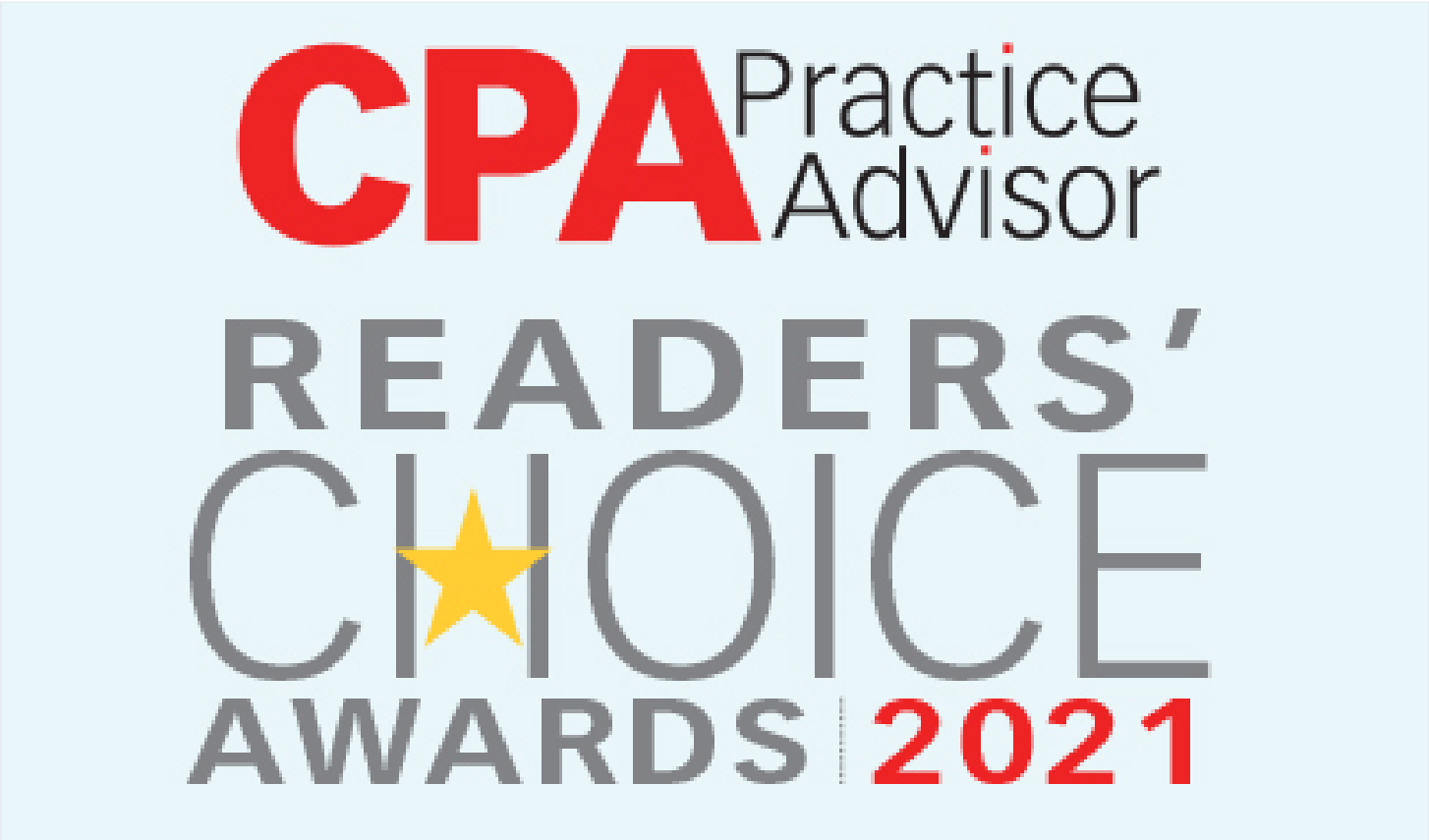
readers the chance to spotlight the technologies they most respect and trust to provide client services, to manage their firms, and to help their clients run ...

Isaac M. O'Bannon • Apr. 01, 2021



From the April 2021 issue.

Some say the Covid pandemic changed everything. Others say, it just rapidly pushed technology adoption to move faster. In either case, technology has played an important role in the evolution of the accounting and tax profession, and remote technologies were critical over the past year, as virtually all firms moved to remote work environments that centered around digital collaboration with no direct client contact.

While most accounting firms had already at least partially adopted systems that

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for our readers to spotlight the technologies they most rely on and trust to manage their firms, provide client services, and help those clients run their businesses. From online tax and accounting systems, practice management, document automation and workflow tools, to apps for collaboration, mobile productivity and research. And, of course, office hardware.

The awards also let professionals see the technologies and workflow systems their peers are using, which can help them stay competitive and build stronger firms. We thank the thousands of professionals that participated in voting this year. And now, the results are in:

IN-FIRM TECHNOLOGIES

Federal/State Income Tax Preparation

Insight: The most voted on category in the awards each year, nearly all respondents report using a professional tax system. Drake Software's customers always turn out in high numbers to vote, resulting in another win this year, and showing the loyalty these customers have for this company's tax and tax practice management software.

WINNER: Drake Tax Software (37%)

Runners Up:

- Intuit Lacerte, ProSeries or ProConnect TaxOnline (27%)
- Thomson Reuters UltraTax or GoSystem RS (8.7%)
- Wolters Kluwer ATX or TaxWise (8.6%)
- Wolters Kluwer CCH Axcess Tax or CCH ProSystem *fx* Tax (5.7%)
- TaxAct Preparers' Editions (3.8%)
- RCS TaxSlayer Pro (2.7%)
- MyTaxPrep Office (1.9%)

- Other (4.6%)

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exceptional skill. Tax planning also offers a great chance for an additional engagement with your clients, helping to create hypothetical situations based on current and projected tax law, phase-ins and outs, and life event changes such as variations in income, college and other family matters. The result can be proactive tax savings.

WINNER: Drake Tax Planner (39.7%)

Runners Up:

- Intuit Lacerte Tax Planner (26.7%)
- Thomson Reuters Checkpoint or Planner CS (10.9%)
- Wolters Kluwer CCH ProSystem *fx* Planning (7%)
- Bloomberg Tax Income Tax Planner (4.2%)
- Corvee Tax (2.5%)
- Other (9%)

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Specialty Systems & Tax Prep Tools

Insight: Sometimes even the most comprehensive tax prep system doesn't quite have everything you need for uncommon returns or your practice's workflow process. We call these tools that fill in the gaps or help amp your firm productivty, "specialty systems."

WINNER: QuickBooks Self-Employed (26.7%)

Runners Up:

- GruntWorx (20.7%)

- CCH Axcess Document, CCH ProSystem *fx* Document, or CCH ProSystem *fx* Scan

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- Other: (0.5)%

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Tax & Accounting Research Systems

Insight: To reiterate: major tax law changes every year, ugh, making tax research more important than ever. Even if the tax law stayed the same for several years, there would be a need for tax research, since nobody can know everything, and periodically you will have a situation that you hadven't addressed before, or in years. A comprehensive research system should include primary source material such as the federal tax code and state tax laws, as well as tax court rulings and expert analysis of these materials. Some of the available tax research systems integrate with tax preparation programs, while others are used separately and can be used alongside any system.

WINNER: TheTaxBook – Tax Materials Inc. (60.1%)

Runners Up:

- QuickFinder Tax Handbooks (8.2%)
- Thomson Reuters Checkpoint (RIA) (7.1%)
- CCH IntelliConnect (Wolters Kluwer) (5.3%)
- TaxSpeaker (4.9%)
- Parker Tax Pro Library (4.8%)
- Intuit Tax Research & TaxAlmanac.org (4.7%)
- Tax Talk Today (2.7%)
- Bloomberg Tax Financial (2.2%)

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Tax Document Automation

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- Wolters Kluwer CCH Firm of ProSystemfx Scan (8%)
- Canopy Tax (7.4%)
- SurePrep 1040Scan Pro, 1040Scan Organize (6.7%)
- SafeSend Returns (4%)
- Corvee (0.6%)
- Other (10.5%)

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Sales & Use Tax Preparation

Insight: – Sales taxes can be quite simple for very small businesses, with one or two short online forms to fill out per quarter. But for growing business with an online presense, it has always been a challenge to keep up with so many jurisdictions. Wayfair was supposed to make things easier, but in just a few years, it has become the same albatross sales taxes were before it. Fortunately for the businesses with more complex sales tax needs, many systems now automate much of the compliance and reporting processes, including applying the correct sales tax rate, filing and payments. Most voters in this category (20.2%) said they use state tax agency websites or use the sales tax functions built into accounting systems (34.6%). However, among the votes for specific sales tax software, the results were:

WINNER: CFS Tax Software (19.7%)

Runners Up:

- Avalara AvaTax, Avalara Returns for Small Business (14.3%)
- eFileSalesTax.com (12%)
- TaxJar (9.8%)
- CCH Wolters Kluwer (SureTax/SalesTaxOffice) (8.6%)
- Sovos Tax Solutions (8.5%)

- Thomson Reuters ONESource Indirect Tax (5.5%)

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certificates. Businesses who occasionally or routinely make sales to purchasers who are exempted from sales taxes must maintain a record of these exemption certificates. Although most firms in our survey did not express a preference or personal use with these products, those who did voted as follows:

WINNER: Thomson Reuters ONESOURCE (35.7%)

Runners Up:

- Vertex Inc. Exemption Certificate Manager (25.9%)
- Avalara CertCapture (15%)
- Sovos Tax Solutions (9.5%)
- Other (13.9%)

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Accounting Write-Up Systems

Insight: The cloud has dramatically changed write-up, but the basics are still the same: ensuring a business' bookkeeping is accurate. Since small businesses are frequently victims of internal fraud (or bad bookkeeping), their books still need periodic review and reconciliation by a professional.

WINNER: Intuit QuickBooks Accountant (54.6%)

Runners Up:

- Drake Accounting (15%)
- Thomson Reuters Accounting CS (5.6%)
- PC Software Accounting Inc. (5.5%)
- Sage One (3.7%)
- Xero (2.3%)

- Client Accounting Suite (Wolters Kluwer) (2.2%)

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Insight: With the cloud and other remote technologies, including helpful automation tools, audit engagements no longer take weeks or months to conduct.

WINNER: Wolters Kluwer CCH ProSystem *fx* and Accounting Research Manager (18.5%)

Runners Up:

- Thomson Reuters Workpapers CS, AdvanceFlow or Checkpoint (16.6%)
- AuditFile (9.6%)
- Confirmation.com (9%)
- CaseWare IDEA (8.9%)
- Capital Confirmation (5.7%)
- Suralink (5.4%)
- OnPoint PCR (4.8%)
- Rivio Clearinghouse (4.8%)
- Audit Dashboard Automated PBC (4.2%)
- Audit Confirmations (3.9%)
- Wiley Advantage Audit (3.5%)
- Teammate Analytics (2.4%)
- Other (2.7%)

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Business Valuation

Insight: Business valuations are often necessary during business ownership transfers, divorce litigation and family wealth planning. Although a small niche, about 10% of our voters had a preference in this category.

WINNER: ValuAdder (27.7%)

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Fixed Asset Management

Insight: Fixed asset management straddles the line between being an accounting or a tax function. Tracking and maintaining the location and condition of assets is one part, and properly depreciating them using appropriate treatments is the other. As states get more aggressive on tax collections, property tax assessors will likely become more vigilant as well, so strong asset management is a must-have.

WINNER: Thomson Reuters Fixed Assets CS (26.9%)

Runners Up:

- Intuit ProSeries Fixed Asset Manager (25%)
- CCH ProSystem *fx* Fixed Assets (9.7%)
- Sage FAS Asset Accounting (8.2%)
- Pro-Ware Asset Keeper (7.4%)
- Real Asset Management Inc. (4.1%)
- Wasp Barcode Technologies (2.8%)
- Bloomberg Tax Fixed Assets (2.6%)
- Open Systems (2.1%)
- MultiView Asset Management (1.2%)
- Other (10%)

Payroll

Insight: Payroll is a huge category, and we don't even include every possible option on the market. These systems have gotten so "smart" over the past decade, making

payroll services a respected revenue channel for many firms, who are able to process

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- Gusto Payroll (6.4%)
- Paychex (6.2%)
- Thomson Reuters Accounting CS Payroll or myPay (3.5%)
- PC Software Accounting Inc. (3.4%)
- AMS 1099-Etc Payroll (2.5%)
- Sage 50 (2.4%)
- AccountantsWorld Payroll Relief (2.1%)
- Crest Payroll (1.6%)
- CYMA Payroll (1.5%)
- Cougar Mountain (1.5%)
- Patriot Software (1.4%)
- SurePayroll (1.4%)
- CheckMark Payroll (1.3%)
- Other (Real Business Solutions, Rippling, PenSoft, BenefitMall, OnPay, Paylocity, Red Wing Software, JustWorks, PayCom, Workful): (15.7%)

* **QuickBooks Payroll – by Intuit** includes QuickBooks Online Self Service Payroll, QuickBooks Online Full Service Payroll, QuickBooks Desktop Enhanced Payroll, and QuickBooks Desktop Assisted Payroll.

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1099/W-2 Compliance

Insight: Most systems designed to prepare forms W-2 and 1099 for multiple clients also automatically file them, and help eliminate much of the work required to process hundreds or thousands of forms.

WINNER: Drake Accounting (15.4%)

Runners Up:

- eFile4Biz (6.9%)

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- W2 Mate (3.5%)
- Wolters Kluwer Payroll Compliance Reporting (2.6%)
- 1099 Pro (2.5%)
- Tenenz Laser Link (2.5%)
- AccountantsWorld (2%)
- EG Systems (1.6%)
- Convey Compliance (1.5%)
- Magtax American Riviera (1%)
- FormMagic Tax-Mate (1%)
- Spokane Computer MAG-FILER (0.5%)

- Other (PCSAI, Adams, Tax 1099, Efile My Forms, AME, ATX, TFP, Medlin, Sage): (18.5 %)

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Time & Billing

Insight: Time and billing management systems do so much more than the name implies, also offering advanced project tracking and reporting that can help determine productivity, profitability of segments of the firm, and identifying roadblocks.

WINNER: TSheets by QuickBooks (26.2%)

Runners Up:

- OfficeTools Workspace by AbacusNext (8.9%)
- Sage Timeslips (6.9%)
- ImagineTime (6.2%)
- ClockShark (5.7%)

- Bill.com (5.4%)

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- Other (10.7%)

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Practice Management

Insight: We define practice management as those with more extensive functions for managing firm productivity and workflow management, automation of tasks, and record maintenance.This year's winner, Financial Cents, is a relative new-comer, but has wowed the firms using its system enough that they voted it into first place.

WINNER: Financial Cents (40%)

Runners Up:

- Thomson Reuters Practice CS (13.3%)
- CCH Axcess Practice, CCH iFirm or CCH ProSystem *fx* Practice (9.3%)
- Canopy Tax Practice Management (8.6%)
- ClientWhys/TaxBuzz.com (6.9%)
- Karbon Workflow Management (3.5%)
- TaxWorkFlow (2%)
- XCM Workflow (1.5%)
- BQE Core or Core AI (1.4%)
- Other (13.5%)

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Online Invoicing/Bill Payment Solutions

Insight: Stand-alone invoicing tools can help firms with AR, while bill payment

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- Xero (5.2%)
- ReceiptBank (5.1%)
- Sage Payments (4.2%)
- FreshBooks (3.3%)
- Bill & Pay (2.9%)
- CollBox (2.9%)
- BizPayO (2.8%)
- Zoho Books (1.3%)
- Other: (3.4%)

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Client Portals

Insight: Sending client invoices by email is a big no-no. It is not secure and can lead to fines for the firm for breaching privacy and data protection laws. But client portals are a safe and efficient way to give clients access to not only their invoices, but also virtually any of the files you want to share with them, including returns, financials and other documents. They also make it easier for clients to submit documents to the firm.

WINNER: Drake Software SecureFilePro.com (25.9%)

Runners Up:

- Citrix ShareFile (8.8%)
- DropBox (8.2%)
- CCH Axcess Portal / CCH ProSystem *fx* Portal / CCH iFirm (5.8%)
- ClientWhys/TaxBuzz.com (5.7%)
- Thomson Reuters NetClient CS Portals or Onvio (5.2%)
- Canopy (4.7%)

- SmartVault (4.6%)

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- Other (13.3%)

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Document Management & Document Storage

Insight: There is a wide range of systems in this category, ranging from basic file folders, to advanced programs that include client collaboration tools, automatic archiving, retention functions and multi-worker productivity features.

WINNER: Drake Document Manager (32%)

Runners Up:

- Intuit ProSeries & Lacerte DMS (11.4%)
- Thomson Reuters FileCabinet CS/GoFileRoom (9.7%)
- ClientWhys/TaxBuzz.com (5.8%)
- SmartVault Document Storage (5.1%)
- CCH Axcess Document or CCH ProSystem *fx* Document (4.8%)
- eFileCabinet (4.7%)
- Doc.IT – Doc.IT DM (3.6%)
- OfficeTools WorkSpace by AbacusNext (3.1%)
- Doculex (3%)
- Conarc (2.8%)
- AccountantsWorld Cloud Cabinet (2.6%)
- Cabinet SafeCloud (1.4%)
- Suralink (1.4%)
- Canopy (1%)
- PaperlessPlus (1%)
- Personable (1%)
- Other (5.6%)

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Runners Up:

- HP (22.5%)
- Canon (10.4%)
- Kofax (9.2%)
- Nuance (8.1%)
- TicTie Calculate by SafeSend (7.1%)
- ABBYY (2.7%)
- Other (0.3%)

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Comprehensive Firm Workflow Systems

Insight: This category is divided into two groups: Comprehensive Workflow, and Other Workflow Tools, which are designed for aiding in specific tasks and engagements and for smaller firms. Financial Cents also took first in this category, providing firm workflow management tools that optimize firm profitabitilty.

Comprehensive Workflow

WINNER: Financial Cents (54%)

Runners Up:

- Thomson Reuters Practice CS Project Management (12%)
- CCH Axcess Practice or CCH iFirm (10.6%)
- OfficeTools WorkSpace by AbacusNext (7.3%)
- TaxWorkFlow (4.5%)
- XCM Workflow (3.9%)

- Tax Dome (2.2%)

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Runners Up:

- Intuit Tax Import or DMS for Lacerte and ProSeries (14%)
- Citrix ShareFile for Accountants (10.1%)
- Various CCH ProSystem *fx* Systems (10%)
- Canopy (8.2%)
- Thomson Reuters GoFileRoom/Practice CS/Workpapers CS (6.1%)
- eFileCabinet (5.2%)
- Bill.com (4.7%)
- Expensify (4.6%)
- SmartVault (4.2%)
- OfficeTools WorkSpace by AbacusNext (3.7%)
- Doc.IT (3.6%)
- SurePrep (2.6%)
- Karbon Workflow Management (2.4%)
- Suralink (2.1%)
- Audit Dashboard (1%)
- Tallie (0.9%)

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Website Builders & Services for Accounting Firms

Insight: Yes, you still need a website. No, a Facebook page is not adequate. These systems make it easy and affordable to create a firm website and keep it up-to-date.

WINNER: GetNetSet (16%)

Runners Up:

- Drake SiteDart Website Services (12%)

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- Accountants World Website Relief (3%)
- Network Management Group (NMGI) WebCare (2.9%)
- Other (8.9%)

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Favorite CPE Provider

Insight: Whether keeping up on the latest change in tax, A&A, firm management or technology, earning CPE credit is mandatory for CPAs.

WINNER: CPAAcademy (15.9%)

Runners Up:

- Drake CPE (12%)
- AICPA (9%)
- Surgent CPE (7.5%)
- MyCPEwebinars (6.5%)
- NATP (5.2%)
- CPA Practice Advisor (5%)
- TaxSpeaker (4.7%)
- TaxBook (4.6%)
- NASBA (3.7%)
- Spidell (3.2%)
- Canopy CPE (2.5%)
- IRS (2.3%)
- Becker CPE (2.2%)
- Thomson Reuters Checkpoint (2.1%)

- Western CPE (1.8%)

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WINNER: Live Online Classes/Webcasts (40.1%)

Runners Up:

- In-Person Seminars/Workshops (29.4%)
- Self-Study with Tests (28.4%)
- Other (2.1%)

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Which Conferences Do You Attend?

Insight: Remember conferences? While most were canceled or went digital in 2020, it looks like technology companies are tentatively scheduling their events to take place in person again starting later in 2021. Professionals frequently attend conferences to learn of new tax and accounting laws and trends, firm management issues and technologies. A lot of state society shows were listed in the "other" category. Many respondents chose more than one event.

WINNER: QuickBooks Connect (16.5%)

Runners Up:

- NAEA National Conference (14.8%)
- Thomson Reuters Synergy (9.3%)
- AICPA ENGAGE (Las Vegas) (8.7%)
- NATP (8.3%)
- L.A. Accounting Show (4.5%)
- CCH Connections (4.3%)
- N.Y. Accounting Show (4.3%)
- FICPA Florida Show (3.3%)

- Scaling New Heights (3.1%)

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- Other (8.1%)

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SMALL BUSINESS ACCOUNTING SYSTEMS

Insight: There are several sub-categories in this group: Below are the top vote-getters in each category.

Small Business Accounting – Installed Programs

WINNER: Intuit QuickBooks Desktop (73.5%)

Runners Up:

- PC Software Accounting Inc. (8.1%)
- Sage One, Sage 50 or Sage ERP (5%)
- RealEasyBooks (3%)
- Red Wing Wosftware CenterPoint (2.4%)
- Cougar Mountain Denali (1.1%)
- Acclivity (0.8%)
- Drake Accounting (0.7%)
- A-Systems Visual Bookkeeper (0.7%)
- CheckMark Software MultiLedger (0.5%)
- Other (4.2%)

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Online Small Business Accounting

WINNER: Intuit QuickBooks Online/Online Accountant (69.6%)

Runners Up:

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- AccountantsWorld Accounting Power (1.8%)
- FreshBooks (1.4%)
- Wave (1.4%)
- Zoho Books (0.6%)
- Workful (0.3%)
- BizAutomation.com (0.25%)
- Other (3.45%)

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Expense and Travel Management Solution

Insight: Even though travel was way down in 2020, other operating expenses didn't change much, and they still need tracking for accounting and tax purposes.

WINNER: Expensify (22.4%)

Runners Up:

- ReceiptBank (18.4%)
- Concur Expense (9.2%)
- ExpensAble (8.8%)
- ExpenseWatch (7.3%)
- SpringAhead (6%)
- Tallie (4.5%)
- Chrome River (4%)
- Zoho Expense (4%)
- SutiExpense (3.8%)
- Certify (3.1%)
- Xpenditure (3%)

- Other (5.5%)

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- NetSuite OnSite POS (4.8%)
- Radiant Systems (4%)
- Database Creations (3.9%)
- Cougar Mountain Denali POS (3.7%)
- Keystroke POS (3.1%)
- Celerant Command Retail (3%)
- CAM Commerce Retail STAR (2.5%)
- Vend POS (2.1%)
- AccuPOS (2%)
- AddSum (1.8%)
- Wasp Barcode (1.1%)
- Other (9.6%)

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Not-for-Profit Accounting

WINNER: Intuit QuickBooks Premier Nonprofit (51.9%)

Runners Up:

- Sage Intacct (5.3%)
- GMS Software (5.2%)
- Blackbaud Financial Edge or Fundware (4.9%)
- Fund E-Z (4.2%)
- OneNFP (3.9%)
- CYMA Systems (3.6%)
- Cougar Mountain FUND Suite (3.3%)
- Aplos (3.1%)
- Araize (3%)

- Open Systems TRAVESE (1.9%)

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ASP/Hosted Solution Providers

WINNER: Right Networks (28.1%)

Runners Up:

- Thomson Reuters Virtual Office CS/SaaS (17.9%)
- Drake Hosted (14%)
- Network Management Group Inc. (NMGI) (9.5%)
- Network Alliance (9.2%)
- CPAASP/InsynQ (4.5%)
- AbacusNext Private Cloud and Cloudnine Realtime (4%)
- Ace Cloud Hosting (2.4%)
- Cetrom CPA Cloud (1.1%)
- Other (9.3%)

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Outsourced Technology Services

Insight: These companies offer a variety of hosting and outsourced business process services. Of the votes for the solutions listed, the results were:

WINNER: Right Networks (29.6%)

Runners Up:

- Network Management Group Inc. (NMGI) (16.9%)
- InsynQ/CPAASP (14.2%)
- CPA2Biz Email Solutions (12.3%)
- CollBox (6.2%)
- Ace Cloud Hosting (6.1%)

- Cetrom (3.6%)

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Insight: Printers are needed even in the "paperless" office.

- HP (28.6%)
- Brother (26.3%)
- Fujitsu (13.6%)
- Canon (10.4%)
- Epson (7.2%)
- Lexmark (3.5%)
- Dell (3.1%)
- Other (7.3%)

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OUT-OF-OFFICE

Favorite Form of Physical Exercise During Tax Season

WINNER: "Who has time to exercise?" (32.1%)

- Walking (10%)
- Jumping to Conclusions (8.5%)
- Bicycling (7.8%)
- Jogging/Running (7.7%)
- Weightlifting (7.5%)
- Yoga (6.5%)
- Aerobics (5%)
- Racket Sports (2.8%)
- Team Sports (2.8%)
- Other (9.3%)

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- Less than 1 hour per week: 16.1%
- Between 10-19 hours per week: 9.8%
- 20+ hours per week: 15.2%

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How "social" are you? Which social media tools do you use in conjunction with your work?

About half of our voters said they don't use any social media tools for business purposes. Of those who do, the breakdown is as follows (multiple responses were allowed), so totals equal more than 100%:

- Don't use any social media for business 39.6%
- Facebook 36.6%
- LinkedIn 32.4%
- Twitter 11.2%
- Instagram 11.2%
- YouTube 10.5%
- Google+ 9.5%
- Yelp 5.3%
- Pinterest 4%
- TikTok 2.6%
- SnapChat 2.4%
- Reddit 1.7%
- Vine 1.6%
- Other 2.2%

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Thank you to the more than 4,700 tax and accounting professionals who

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