

# WHO'S WHO

## AMONG THOSE SERVING THE TAX & ACCOUNTING PROFESSION



### COMPANY INFORMATION

Founded in 2002 by a CPA, SurePrep's tax document automation and paperless workpaper software plus its onshore and offshore tax return preparation services are used by nearly half of the top 100 accounting firms in the country. One of the keys to SurePrep's success has been its continued development and enhancement of its products and services to meet the constantly changing needs of the profession. With SurePrep's solutions, tax and accounting practices are given the ability to work smarter, not harder, increasing productivity and profitability, while promoting fully paperless workpaper preparation and review. SurePrep's products and services have been used in the preparation of over 1,000,000 tax returns and the company is committed to continuing its mission of developing technology and service solutions that aid the tax and accounting profession.

paperless workpapers a reality. With electronic tools that mimic the paper world, SPbinder allows practitioners to organize Excel files, Word documents, PDF files and Outlook emails into one digital binder. Each sheet in the Excel workbook and each page in the PDF file becomes a separate SPbinder workpaper that can be organized, indexed and cross-referenced – something no other solution on the market can offer. The system not only speeds up the preparation and review process but also increases the accuracy of review by providing missing source document reports that assure completion, giving the firm electronic workpapers with cross-referenced drilldown access to source documents.

### TAX OUTSOURCING SERVICES

SurePrep's onshore and offshore tax return preparation services allow CPA firms to expand their 1040, 1041, 1120, 1120S and 1065 client base without having to increase staff or work longer hours during tax season. Instead, SurePrep's tax professionals manage preparation tasks during busy season, thereby allowing you to spend more time providing more profitable value-added services.

### MARKETS SERVED

SurePrep is focused on providing tax and accounting firms with practical services and products designed to save time and streamline workflow. From tax return preparation services to technologies for automating workpaper preparation and review, SurePrep is dedicated to helping its clients achieve greater efficiency and profitability.

### CUSTOMER SUPPORT

SurePrep's corporate headquarters and customer support service staff are located in southern California. The company's knowledgeable staff of credentialed tax and accounting professionals is available by phone, web conferencing, live chat and email. SurePrep's training courses help to prepare firms to take full advantage of all the products and services that the company has to offer. SurePrep's automated, modular training gives clients the flexibility of learning when it's most convenient for them. SurePrep's training methodology won the K2 Enterprise Quality Award in 2009 for professional education and consulting.

## 1040SCAN

### OCR SOLUTIONS

SurePrep's 1040SCAN suite of OCR (Optical Character Recognition) solutions gives accounting firms the ability to reduce time spent on antiquated manual processes and spend more time on value-added consultative work. Whether it's reducing the time spent organizing client source documents such as organizer pages, W-2s, K-1s and brokerage statements with 1040SCAN ORGANIZE, or exporting source document data to tax software with the full featured 1040SCAN PRO, SurePrep's OCR offering drives time savings to the accounting firm's bottom line.

### SPBINDER

SPbinder is a revolutionary workpaper management and workflow system that makes



### AUTOMATED WORKPAPER & WORKFLOW MANAGEMENT

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**Number of employees:**  
200+

**Year Founded:**  
2002



## The Evolution of Tax Prep



Scribes used stone tablets to impose taxes on cooking oil

The abacus was used to calculate an inheritance tax

Scroll and quill pen were used to levy a tax on property

19th century saw the first income tax in the U.S.

Couriers & data centers were used to prepare tax returns

Personal computers eliminated couriers & data centers from the process

Optical character recognition eliminates manual organization and data entry

### Where are you in the timeline?

Tax return preparation used to consist of paper forms completed in pencil or pen. Those forms were couriered back and forth between accounting offices and data centers where the calculations were done on mainframe computers.

The personal computer eliminated couriers and data centers from the process but tax return preparation was still paper based and manual.

Today, scanning allows for on-screen viewing and electronic storage; however, the manual processes of workpaper organization and data entry into tax software result in lost time. Workpaper preparation and review is inconsistent and clumsy because tools like Adobe Acrobat are not designed for accountants.

The next stage in the evolution of tax prep is here. 1040SCAN automatically bookmarks and organizes tax workpapers and exports data to tax software. Tax workpapers are then reviewed using the most advanced electronic workpaper system in the tax and accounting industry.



Learn more and download a **FREE** trial at: [sureprep.com/who](http://sureprep.com/who)

1040SCAN is ushering in the new era of tax prep.

Let us show you how at [sureprep.com/who](http://sureprep.com/who)



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