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Mary Girsch-Bock • Aug. 27, 2018



Intuit – Lacerte Tax

<https://proconnect.intuit.com/lacerte>

From the 2018 reviews of professional tax preparation systems.

Lacerte Tax from Intuit is a good fit for accounting firms that offer a variety of tax-related services to both individual and business clients. The product easily handles a

variety of return types and offers seamless integration with QuickBooks applications.

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Lacerte offers a unique interface that allows users to easily view all clients at once using the customizable columns. The interface also offers access to all forms, tools, diagnostic resources and print/view functions, eliminating unnecessary data entry and system navigation. Designed for multi-users, Lacerte allows administrators to set preferences across the firm, for complete uniform processing.

Lacerte currently supports more than 6,400 forms, with multiple form modules available for 1040, 1041, 1065, 1120, 1120S, 706, 709, 990, and 5500, with multi-state tax forms supported as well. K-1 transfer capability is also included in Lacerte, so users can import partnership and other fiduciary tax data into individual returns, or between business returns.

Lacerte offers year-round e-file capability with no e-filing fees. Mentioned earlier, the 2018 edition of Lacerte has more than 50 e-file return types added. An e-filing wizard is available that guides users through the entire e-filing process, and users can access the optional eSignature Plus Payments program that provides safe, secure document signing for engagement letters, 7216 Consent forms, Form 4506-T, and Forms 8879. Users can also request and receive payment using the eSignature Plus Payments program.

Most Lacerte input fields are directly connected with the Lacerte Help Center, with users able to simply click on the F1 key to display additional information about the input field. Likewise, most forms are directly linked to government instructions for that particular form.

Tax pros can use SmartVault, which integrates with Lacerte to provide easy document sharing and management. Completed tax returns can be printed directly to SmartVault, and users can easily share documents securely with clients using the custom branded portal.

Users can reduce the amount of paperwork needed by utilizing the direct download

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the ability to import trial balance data directly into Lacerte. This integration also allows users to drag and drop QuickBooks data fields directly into a Lacerte tax form. Users can also export billing amounts in Lacerte directly into QuickBooks for easy processing. The product also integrates with Tax Scan and Import, also from Lacerte, that allows users to easily import data from outside institutions as well as Lacerte Tax Planner and Analyzer, which offers various scenarios for clients as well as custom planning services. The Tax Analyzer offers tax minimizing strategies and red flags for tax amounts that exceed national averages. Lacerte also offers integration with a variety of third-party applications, including eSignature Plus Payments, Document Management System, and SmartVault, as well as OfficeTools and a Pay-by-Refund option.

Automated data conversion is included with Lacerte, so those moving from another application can easily convert previous year data into Lacerte. The product also offers an extensive variety of help and support options which include community support, getting started help, and access to trending questions from other users. U.S. based consultants handle all Lacerte customer support questions, and toll-free technical support is available Monday through Friday during regular business hours.

Lacerte offers a variety of licensing options, including Lacerte 200/Federal 1040, which is ideal for firms preparing less than 200 individual returns annually. Lacerte Unlimited offers unlimited individual and business returns, and Lacerte REP is a pay as you go option for those processing a lower volume of returns. Pricing varies, with all system add-ons priced separately.

2018 Overall Rating: 4.75 Stars

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