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number of returns as well as for those processing numerous individual and business ...

**Mary Girsch-Bock** • Aug. 27, 2018

The image shows the TaxWise logo in a large, bold, green font. The word "TaxWise" is followed by a registered trademark symbol (®). The logo is centered within a white rectangular box.

**TaxWise**

**Wolters Kluwer Tax & Accounting**

<https://taxna.wolterskluwer.com/professional-tax-software/taxwise>

From the 2018 reviews of professional tax preparation systems.

TaxWise from Wolters Kluwer Tax & Accounting is best suited for small to mid-sized firms. TaxWise is scalable, with a version available for firms that process a limited number of returns as well as for those processing numerous individual and business returns for clients. TaxWise is available in both English and Spanish.

Designed to be installed on a local workstation or on a network, TaxWise also offers an online version of the application that only processes 1040 forms; making it a

perfect solution for smaller firms that typically do not process business returns on a

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The TaxWise user interface is intuitive, with the default screen offering a series of icons at the top of the screen that provide quick access to all system functions. The interface is completely customizable, with users able to display frequently used links and shortcuts for more streamlined navigation. The application uses form replicas for entering all tax data and highlights all required fields in red. Data entered in TaxWise will automatically populate any required schedules while preparing the return, and the Easy Interview option guides users through the data entry process to ensure that no fields are overlooked, making it easy for support personnel to collect information from clients. Users can also utilize the 'What if' feature to test a variety of tax scenarios for clients prior to completing and filing the return, and all created scenarios can be saved for future access if desired.

TaxWise supports both federal and state forms, including 1040, 1041, 1065, 1120, 1120S, 5500, 706, 709, 990, and Miscellaneous. E-filing is available for all federal forms as well as any relevant state forms, with 75 state business forms available. Both city and other municipality tax filing is also supported in TaxWise as well. Users can easily track e-filing errors in the diagnostic report, with erroneous information displayed in red. TaxWise also offers filing status, so users will know when returns are accepted. More than 60 tax forms are also available in Spanish.

Line-by-line help is offered in TaxWise, as is quick access to complete IRS instructions, as well as tax research data.

TaxWise offers seamless integration with CCH iFirm's Client Portal, which allows users to securely share documents with clients. The portal home page can be easily branded with a firm's messaging and color scheme, and users can view document status including what documents were uploaded or downloaded and by whom. The Client Portal can be accessed from any device, including desktops, laptops, smart phones, and tablets.

TaxWise also integrates with PaperlessPlus, which offers solid document

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business, along with a multitude of tax handbooks and the ever popular Tax Wizard. For firms that process payroll returns, TaxWise integrates with W2/1099 for easy filing of federal tax returns.

The TaxWise Solution Center offers users easy access to a variety of help and support resources including access to the TaxWise Blog and the searchable Knowledge Base that offers FAQs, product documentation, How-to options, and problem resolution. The Solution Center offers links to the TaxWise Education Library, as well as user guides. Users can access and download product updates from the Solution Center and can update account information if necessary. TaxWise offers online and toll-free telephone support, with support included in the cost of the product.

TaxWise is a solid tax compliance application ideal for small to mid-sized firms. The product offers a scalable solution, with options available for smaller firms, for firms that only process 1040s and for larger firms that process both individual and business returns. TaxWise is offered in both English and Spanish and is available in three editions; TaxWise Pay-Per-Return, which is \$569.00; TaxWise ProFiling, which focuses on federal and state returns and runs \$1129; and TaxWise Power, which handles both individual and business returns and is available for \$2,579.

## 2018 Rating: 4.75 Stars

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