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SurePrep — 1040SCAN Pro, 1040SCAN Organize

2012 OVERALL RATING ★★★★★

★★★★★ CORE PRODUCT FUNCTIONS/FEATURES

★★★★★ PAPERLESS WORKFLOW

★★★★★ INTEGRATION

★★★★★ HELP/SUPPORT/TRAINING

800-805-8582

www.sureprep.com

2012 Overall Rating 4.75

Best Firm Fit

Firms where more than one person is involved in the tax return preparation process with multiple levels of sign-off. It's also a good fit for firms using the supported tax software who are willing to use SurePrep's proprietary data-entry and SPbinder tools.

Strengths

- SPbinder has an impressive feature set for organizing and annotating PDFs, Word

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Potential Limitations

- With so many options available, new users may experience a learning curve and take time to discover their preferred settings.
- Data-entry interface used to validate data is proprietary and different from the tax applications. Files created with SPbinder are also proprietary and cannot be modified with other common PDF editing applications like Adobe Acrobat. However, users have the option to skip the verification step and create an Adobe-compliant PDF instead of using SPbinder.

Summary & Pricing

SurePrep has many years of experience providing accounting firms with a product line of scan, organize, and populate tax products that have improved year after year. Among its product offerings are the following:

1. **SPbinder** is a powerful electronic binder and workflow system built for organizing electronic workpapers and managing the tax preparation process. Some of its useful features include a wide selection of annotations, multiple levels of sign-offs, as well as dynamic workpaper referencing and linking.
2. **1040SCAN Organize** uses form recognition technology to bookmark and organize standard tax documents.
3. **1040SCAN Trades** extracts an unlimited amount of capital gain and loss detail from brokerage statements to Excel and to Schedule D of supported tax software.
4. **1040SCAN Pro** exports data from standard source documents into supported tax software with tools to ensure accuracy and prevent duplication.

SurePrep also offers outsourced tax preparation services where the information from

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- 1040SCAN Pro: \$30 per engagement (includes SPbinder, Organize and Trades)

Significant discounts to these rates are available to users based on early season and multi-year purchase commitments.

Core Product Functions/Features 5

Paperless Workflow 4.75

Integration 4.5

Help/Support/Training 4.75

Technology

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