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AgileTax by Thomson Reuters

(855) 244-5382

www.AgileTax.com

From the **May 2013 review** of Professional Tax Preparation systems.

Best Firm Fit

- Startup firms who need to pay over time or are unsure how many returns they expect to prepare.
- Firms who need built-in online collaboration or work with part-time preparers or preparers in remote locations.

Strengths

- No installation or updates, as product runs completely in a web browser using the Microsoft Silverlight plugin
- Product is inexpensive and has a very reasonably priced unlimited pay as you go plan for additional preparers
- Data files are backed up by Thomson Reuters (the publisher of UltraTax and GoSystem Tax RS) and the primary data files are not stored on the remote computer
- Tax forms received by individuals are entered on facsimiles of the IRS version of these forms (e.g. W-2, 1099, 1098, etc.), so inexperienced preparers have a better chance to input each field in the proper location

Potential Limitations

- AgileTax is completely web-based, and there is not a version of the application

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OVERVIEW

AgileTax is a new, entry level practitioner application from Thomson Reuters which was launched in April 2013. The software is completely web-based, and is developed using the calculation engine used in the acquired TaxSimple product. The software has fewer input screens than many competitors in this segment, as the product is designed for users to do some of the data entry on the face of the return itself.

AgileTax supports preparation of individual returns for Federal, all states, and MI/NY city returns, with electronic filing for both Federal and all supported states. Business returns available for partnerships, C-Corps, and S-Corps include Federal, all states, with e-filing for federal and all states which support e-filing. The software also supports Federal forms 1041, 990, 706, and 709, as well as state trust returns for NY, NJ and WI.

The application has no integration to accounting software like QuickBooks or any of the Thomson Reuters CS Professional Suite applications. The product does have a limited capability to import securities trades from an Excel spreadsheet, however, the data columns must be arranged in a precise format or the import will fail.

Summary and Pricing

AgileTax pricing starts at \$100 per month for unlimited 1040 processing and an additional \$50 per month for unlimited 1041, 1120, 1120S, 1065, 990, 706 and 709, the three state trust returns, as well as federal, state, and e-filing for one preparer (12 month commitment). Additional preparers can be added on a month to month basis for \$50 per month, per preparer, and these preparers can prepare all of the same returns included in the primary user's twelve month subscription.

Optional add-ons include 100 private client portals for \$10 per month.

2013 Ratings:

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Overall Rating	3.75

Software

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