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800-230-2322

[www.taxworks.com](http://www.taxworks.com)

# 2011 Overall Rating 4.25

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## Best Firm Fit:

Small 1040-focused tax offices with limited to moderate need for additional entities.

## Strengths:

- All federal and state entities
- Integrated bank products
- Good client communication templates & e-mail integration
- Data import from multiple accounting systems
- Built-in invoicing
- Available tax planner & document management system

## Potential Weaknesses:

- No client portals
- Lacks document automation tools (scan & populate)
- Limited tools for multi-preparer collaboration on complex returns

## Executive Summary & Pricing

TaxWorks is a great package for small firms with high-volume 1040s and an occasional need for business entities. The package includes good data import from outside accounting packages, provides a good collection of firm tools for document

management, asset management and planning. The vendor also offers good support.

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product depth/multi-state

navigation/ease-of-use

support for special situations

electronic filing

## **3.75 – Paperless Workflow**

paperless creation

paperless open items

access control for limiting access into returns

digital document storage/mgmt.

data import/export

## **4.25 – Integration**

w/in Publisher's own suite

w/tax research tools & guidance

w/other or external programs

w/external services

## **4.5 – Help/Support**

online resource center

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