CPA
Practice Advisor

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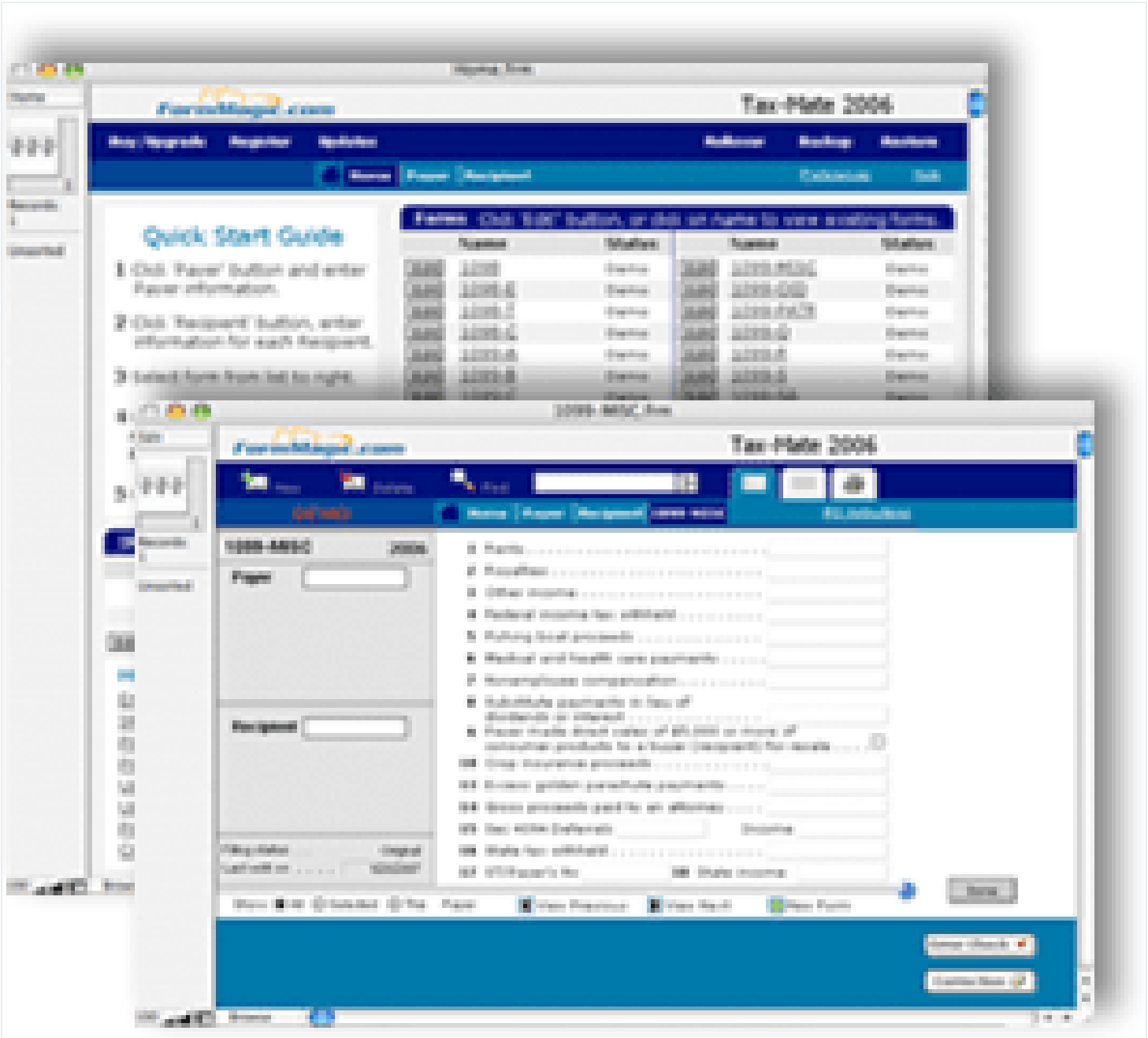

Tax-Mate 1099 is a year-end compliance solution that comes in four editions, Print, Print Plus, Transmittal, and Advisor with each edition providing more features, respectfully. This article will focus on Tax Mate 1099 Advisor due to the focused effort on accountant centric features.

Basic System Functions – 5 Stars

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populates the W-3 and 1096 forms and generates reports with self-totaling list columns for easy total verification.

Reporting – 4.5 Stars

Tax-Mate 1099 Advisor supports all W-2 and 1099 form types in both printed and electronic filing formats. All generated forms are available for on-screen preview and plain paper printing within the system, without requiring a separate print module. Tax-Mate 1099 Advisor provides an option to mask the TIN/SSN on the printed forms.

All electronic filings with the IRS and Social Security Administration conforms to current standards. Prior to submission, Tax-Mate 1099 Advisor goes through a process to verify TINs/SSNs with the IRS and Social Security Admission.

integration/Import/Export – 4 Stars

Tax-Mate 1099 Advisor rolls transfers all prior year data to the current year through a transfer wizard. Tax-Mate 1099 Advisor has a backup system built into the solution. Tax-Mate 1099 Advisor automatically archives the past 5 days of activity, which is available for file restore at any time.

Tax-Mate 1099 Advisor imports data from text and Microsoft Excel files as well as a variety of other file type such as HTML, Lotus and tab delimited.

Help/Support – 4.25 Stars

Due to some limited staff resources, support for Tax-Mate 1099 Advisor is predominantly through email correspondence. Phone support is only available during dedicated hours Monday through Thursday. Outside of the dedicated times, users will need to rely on phone messages to resolve issues.

Tax-Mate 1099 Advisor provides a five-step Quick Start Guide for new users. A full

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Accounting practitioners looking for a full-service and flexible application to handle multiple W-2 and 1099 year-end filings

Strengths

- Available as a tax reporting solution for Windows and Mac platforms
- Comprehensive list of data import types
- Strong electronic filing capabilities

Potential Limitations

- Potential limited phone support

Summary & System Pricing

Tax-Mate 1099 Advisor is a full-service application for accounting firms that need power and flexibility when processing a high volume of year-end tax compliance. Tax-Mate 1099 actually comes in four editions, with the Advisor edition being the most comprehensive. Current pricing for Tax Mate 1099 Advisor is $325 and provides all functions noted above. Pricing for the Print, Print Plus and Transmittal editions are $99, $165 and $215, respectfully. Heavy discount pricing is available for future upgrade pricing.

2014 Overall Rating: 4.5 Stars

Financial Reporting • Income Tax • Payroll • Taxes

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