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Mary Girsch-Bock • Aug. 18, 2017



My TAXPrep Office

Advanced Tax Solutions

My TAXPrep Office from Advanced Tax Solutions is a good fit for tax preparation sites that process a high number of fairly straightforward individual and business tax returns. Ideal for firms or preparers with multiple locations, My TAXPrep Office offers unlimited federal and state e-filing.

From the **2017 Review of Professional Tax Preparation Systems**.

My TAXPrep Office is an online application that can be access from a desktop system, as well as laptop, tablet, smartphone, Mac or PC. The product offers a completely

customizable dashboard that features performance indicators, real time status of

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Perfect for firms with multiple offices, firm administrators can easily view the status of other offices, and can even establish permissions for each office if desired.

My TAXPrep Office supports Federal 1040 forms and schedules including all states with a filing requirement, and also supports federal forms 1120, 1120s, 1065, 1041, and 990 forms and schedules. Multi-state preparation is also available in My TAXPrep Office. The product offers a toolbox that provides a variety of resources including a customizable client organizer, a client letter template, a print packets option, and access to a Signature Pad app for easy electronic form signing.

My TAXPrep Office offers unlimited e-filing capability, with users able to easily track all e-filed transmissions, both for federal and state e-filing. The system will also provide users with the number of accepted and rejected forms.

Designed for quick turnover and fast processing, the product does not offer a client portal, nor is there any real option for paperless workflow. The Print Packets option allows users to set a default printing option, with the application automatically printing file and client copies of returns which can be emailed to clients.

My TAXPrep Office is a completely integrated application, with all features working together. All editions of the product offer unlimited e-filing for federal and state forms, with the Individual version only offering 1040 preparation, while the other two editions; Essential and Unlimited offer business return processing as well. All editions also offer integration with at least one banking product (Individual), with Essential and Unlimited offering integration with multiple banking products, which include EPS Financial, Refund Advantage, Santa Barbara Tax Products Group (TPG) and Navigator Financial Products. The Signature Pad app is also included in all editions of My TAXPrep Office, and Multi-Office Management capability is available in the Unlimited version of the application.

My TAXPrep Office also offers easy file conversion from a variety of applications, with

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editions; Individual, which is \$295 and only handles 1040 processing for a single user. The Essential edition is \$495.00 and offers both individual and business return processing while supporting two system users. The Unlimited edition is \$795 and includes Multi-Office Management capability and support an unlimited number of system users.

2017 Rating – 4.25

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