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As noted in the introduction to this review section, the software reviewed here spans a wide range of support for forms, features and specialty niches. Although specializing in different areas, the programs that prepare year-end returns all provide reliable essential basic calculations, but there are notable differences in the way the programs share data between modules, which may mean reducing the need for redundant data entry. As well, additional features added into the programs further differentiate them. Functions such as scheduling and practice management tools provide increased control over productivity, while increased analytics and automated review processes allow for increased quality control over the final return. For many professionals, the use of a third-party tax review program helps provide added assurance that treatments are applied properly, that no tax-reducing options were missed, and that the return is not likely to raise IRS audit flags.

As the primary revenue stream for many firms, tax compliance software should be carefully considered prior to selection, and adequate time should be allowed for practice and training on the new system before the season begins. Our reviews of tax products occur immediately in the two issues after the primary tax season ends, allowing our readers the greatest amount of time to begin their selection process. The key to finding the best program for any firm is to identify those processes that are crucial, as well as critically assessing areas in the firm's return preparation and review processes that would benefit from streamlining or automation, thereby increasing productivity and profitability. Armed with this knowledge, a firm is ready to narrow the field and start testing a few packages in their firm. Ultimately, the best program for your firm is the one that helps you work better, smarter and more efficiently.

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