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Tax Prep Suites

Executive Summary

So are you going to let SALY determine your tax package for next season? “Same As Last Year” will work fine if you are satisfied with your current package. But if you have found that it doesn't fully satisfy your needs and you're not fully content, then explore the other options. The good news is that dramatic improvements in usability over the past several years means that moving to a new system, if you decide to, is not the nightmare it once was.

The programs in this review provide comprehensive compliance suites, including support for forms 1040, 1041, 1065, 1120C, 1120S, 990, 706, 709, 5500 and corresponding

state support. Programs that specialize in niche areas or ones that don't offer the above listed form modules will be reviewed in our June/July issue, along with specialty tax compliance tools.

All of the programs reviewed here scored well in general ease-of-use, and all of the vendors provide data conversion, but this does not mean that there is parity among the packages. Some tax programs are better at performing certain tasks faster, more easily or with better integration than others, just as some vehicles are better at certain tasks. A Hyundai, a Hummer and a Ferrari may get you from point A to point B on some terrain but not over others, since each has its beneficial attributes like cost, endurance and speed. Likewise, each of the programs reviewed here has its strong points, from processing highly complex returns, to speed, analytics, or integrated research and tax planning.

So just as you would tell your clients to shop around for the most favorable bank or mortgage rates instead of just using the same institution year after

year, don't let SALY tell you what software to use. Do your research.

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