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of Professional Tax Preparation Systems

IntelliTax is a professional tax compliance system that includes modules for preparing and filing 1040, 1041, 1120, 1120S and 1065 returns, with bilingual client letters in the program and documentation including demonstration guides, tutorials and presentation CDs, and customer support for Spanish-speaking clients. The core IntelliTax program is bundled into two packages: IntelliTax Individual (previously known as IntelliTax for Windows), which includes compliance for individual federal and state filing, and IntelliTax Business (previously known as IntelliTax for Business), which provides the corporate, fiduciary and partnership returns. IntelliTax Individual includes unlimited e-filing and integrated bank products, and both programs include a variety of review tools, practice management functions and report features that enhance functionality. The 1040-only system is \$498 with current seasonal discounts; the 1040 and business bundle is \$748 with current seasonal discounts. The combined 1040, business and multi-office management program (IntelliManager) costs \$998 with current seasonal discounts. All of these are network-ready and can be used by all users in the same office at no additional cost.

Learning Curve — 5 Stars

The Launch Pad serves as the main start screen for IntelliTax, offering the user access to the Client Profile Screen, which provides a spreadsheet client list that is sortable, filterable and searchable via several methods and displays summary information for each client including name, contact information, acknowledgements and refund/due amounts. For offices with multiple users, an alternate customizable client selection list called My Returns limits the list of clients to only those that the current user is preparing or has prepared. The Launch Pad also provides access to all of the primary features and modules, as well as to general tasks.

Data entry can be performed in either an interview mode or directly on forms,

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shows a prepared interview form to easily jump to input categories such as wages, credits and deductions. It also provides links to forms and schedules associated with the current return. In the Interview mode, this menu displays the steps involved in the process and places a checkmark beside each completed tasks, such as entry of dependent information, wages and deductions. Below this menu, the program includes a live refund monitor that displays the current refund/due amount.

Many of the data-entry fields in the system include auto-fill functions that populate company and employer information after the user enters the EIN or fills in city and state with a ZIP Code entry. Other fields include smart lists that let the user select from previously entered data. The system is quite intuitive even for novice users, who should grow adept at program use with little, if any, training.

Use/Workflow & Productivity Tools — 4 Stars

While working with returns or during the review process, IntelliTax links all subordinate returns and supporting schedules and worksheets to the primary return, making drilldown easy. The system also includes diagnostics, and the IntelliNotes function lets users mark or add notes to fields for later review or override calculations, and monitors these changes by highlighting them. The Review Mode then prompts users to fields that have been marked or overridden, as well as fields that may have incorrect or missing information. An override report acts as an audit trail, noting all changes made during preparation. The review process is also aided by a checklist, and professionals have access to a good selection of reporting options. IntelliTax also includes a basic asset depreciation system.

The Client Profile and My Returns selection lists provide streamlined client management functions and instant access to returns, as well as billing and client

communication tools. Another useful feature is the program's IntelliTax SnapShot

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other accounting packages or with Microsoft Office products. Free conversions are available for most tax packages. Documents can be output to PDF to aid in paperless document storage.

Support/Training & Help System — 4 Stars

The system is generally simple to understand and use, and provides several Help tools such as field-sensitive directions, as well as links to Internet resources. A print copy of the Getting Started Guide accompanies each program and is also available electronically along with a traditional Help index utility. The company also has an online support center with tutorials, program updates and FAQs, while program Auto-Updates, newsletters and e-mail reminders alert users to program updates, new features and other information. Live and web-based training is available.

Relative Value — 4 Stars

IntelliTax offers a good basic package for smaller general accounting practices and streamlined tax-only offices that don't need an extensive system, but who may need the advantages of a networked system that doesn't cost extra. Additionally, the system can support multi-office tax preparers. With multiple data-entry methods, the program is easy to learn and navigate, and client management options make retrieving information simple. The system includes bank product services and unlimited e-filing.

2007 Overall Rating — 4 Stars

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