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stand-alone engagement/trial balance products that are very useful for firms, but you may be saying "I don't need a stand-alone product to meet my trial balance needs." Your firm may concentrate primarily on tax returns, and you don't want to learn a different software package. Well this section is just for you.

There are several options for your firm. Many tax preparation vendors have add-on modules or products that integrate directly into the tax preparation software. This allows a seamless integration of the trial balance and the tax return. It also allows your firm to keep the trial balance and the tax return in the same software application. That is a nice feature when you are trying look up information from last year's tax return. It is also nice when you bring in a new staff member because it takes much less time to get them trained and ready to be productive and billable.

The tax vendor trial balance packages have a lot of the standard features that the stand-alone packages have, but they don't have the electronic storage and workflow features of the stand-alone packages. Let's focus on what these packages have to offer:

Since these programs are not as sophisticated as some of the stand-alone engagement/trial balance packages, they are fairly simple to learn and easy to maintain. An untrained professional can sometimes get "lost" and frustrated in the stand-alone packages, but these programs allow you to get the job done without having to jump through any policies and procedures. The user interfaces of such packages are also very intuitive because the users are already familiar with them.

Similar to the stand-alone engagement and trial balance packages, it is simple to import trial balance data from almost any accounting system. Most of these

trial balance add-ons have QuickBooks utilities and allow users to import trial

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reporting.

As you can see, these trial balance add-ons are suited best for tax return preparation and normally have a lower cost of ownership. Below is a listing of some of the vendors that provide these solutions. Hopefully one of these applications will be able to fit your firm's needs and desires.

Tax Vendors with Trial Balance Modules/Add-Ons

Intuit Lacerte

Lacerte Trial Balance Utility

www.lacertesoftware.com

CCH Small Firm Services

ATX Trial Balance

www.atxinc.com

CCH Small Firm Services

TaxWise Trial Balance

www.taxwise.com

RedGear Technologies

TaxWorks Trial Balance

www.taxworks.com

Drake Software

Drake Tax

www.drakesoftware.com

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