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Intuit, Inc. — Tax Import for Lacerte and ProSeries

Dustin Wheeler • Nov. 29, 2011

Intuit, Inc. — Tax Import for Lacerte and ProSeries

2012 OVERALL RATING ★★★★★

★★★★★ CORE PRODUCT FUNCTIONS/FEATURES

★★★★★ PAPERLESS WORKFLOW

★★★★★ INTEGRATION

★★★★★ HELP/SUPPORT/TRAINING

800-200-7599

<http://lacerte.intuit.com/products/tax-import>

<http://proseries.intuit.com/products/tax-import>

2012 Overall Rating 4.75

Best Firm Fit

Firms using the Lacerte and ProSeries tax programs seeking to reduce the time spent on organizing source documents and data entry.

Strengths

- The new Pre-Import Review feature provides a side-by-side view of electronic values and images from source documents.
- Direct download provides an easy way for clients to provide W-2 and 1099 information and an accurate way for tax practitioners to import that information.
- With per-return, bundled and unlimited pricing options available, it is a good value for firms with varying volumes of individual income tax returns.

Potential Limitations

- Only direct integration is with the Lacerte and ProSeries tax and document management programs, although customers can submit from and work with any document management solution.
- Some firms and clients may be hesitant to download information from financial institutions due to security concerns, even though Intuit uses 128-bit encryption and does not store credentials for accessing clients' online financial accounts.

Summary & Pricing

Tax Import, which integrates with both Lacerte and ProSeries, scans and imports data into the individual income tax modules of the tax applications, operating similarly for both systems. While the Tax Import software is included with both Lacerte and ProSeries, a firm must purchase licenses to use it either individually or in bundles. Intuit has made several improvements from last year's version, including streamlining the data validation process, making the software more efficient and, most importantly, improving the overall accuracy. The list prices for Lacerte Tax Import is \$9.99 per imported return, \$399 for 50 imported returns, \$999 for 150 imported returns, and \$1,499 for unlimited imported returns. Tax Import for ProSeries is \$8.99 per imported return, \$299 for 50 imported returns, \$499 for 100 imported returns, and \$999 for unlimited imported returns. The bundled pricing is for tax year 2011 returns and expires October 31, 2012. This pricing model is a good value for both firms experimenting with the product on a small number of returns and those achieving economies of scale with a large volume of individual income tax

returns. The vendor noted that users of Lacerte or ProSeries have the ability to submit an unlimited number of returns to Tax Import, with five free imports before being asked to buy a license.

Core Product Functions/Features 4.5

Paperless Workflow 4.75

Integration 4.5

Help/Support/Training 4.75

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