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Intuit ProSeries Professional

(800) 934-1040

www.proseries.com

From the [May 2013 review](#) of Professional Tax Preparation systems.

Best Firm Fit

- Small to mid-sized firms who need a tool to prepare a high volume of individual returns as well as some business returns
- Firms who need integrated solutions for Scan and Organize, tax research, fixed assets, data download from financial institutions, QuickBooks, and bank products.

Strengths

- Support for all major types of entities for Federal, State, and some local jurisdictions.
- Bank product support is built into the application
- Included client invoicing system with optional credit card acceptance.
- Available integrations with tools for tax research, fixed assets, document management, W-2 and 1099 preparation, import from QuickBooks, document storage and import of securities gain/loss data
- HomeBase screen simplifies navigation and allows users to see the status of each client on the list at a glance

Potential Limitations

- Intuit does not currently offer an integrated client portal option for any of its tax

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the status of their return at a glance.

ProSeries provides a comprehensive professional compliance system, with bundle options that provide tax preparation for individuals and all other taxed entities at the federal and state level, plus some cities. The program is best suited to high volume 1040 practices with additional need for business filings and integration with common small business accounting programs. The system's optional "scan and organize" digital workpaper system is a good workflow tool for firms, and the ability to download some client and 1099s from financial institutions can save time and improve accuracy.

The software has a number of integrations with Intuit's QuickBooks financial management software, including synchronization of fixed asset data with the Premier Accountant Edition as well as account balance import. Many ProSeries users report that the import is convenient enough that they use QuickBooks as a traditional trial balance application, although the application will also import data from a generic trial balance text file.

An optional feature for preparers is the ProSeries Tax Import Utility, which allows users to scan and organize documents from clients into a bookmarked PDF. This service also downloads client data from investment advisors, payroll providers like Intuit and ADP, and others. The preparer receives a bookmarked PDF file, along with a spreadsheet listing gains and losses on disposal of investments which can be imported into the software.

The software has an optional tax planning tool, and is integrated with the Intuit Tax Research application, which is primarily content licensed from Bloomberg/BNA. Common computations are supported, including MFJ/MFS comparison, kiddie tax, AMT, and others. Bank products are supported within the application, and users can collect fees from customers using optional Intuit Merchant Services.

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2013 Ratings:

Intuit ProSeries Professional	
Core Product Functions/Features	5.0
Paperless Workflow	4.5
Integration	5.0
Help/Support	4.25
Overall Rating	4.75

Software

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