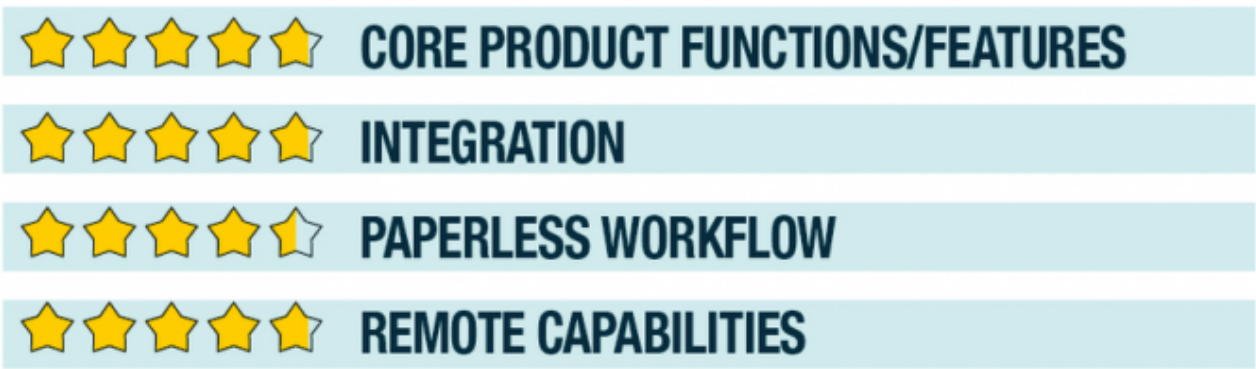


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2011 OVERALL RATING ★★ ★★ ★★ ★★ ★★



OVERALL RATING 4.75

800-968-8900

CS.ThomsonReuters.com

Product delivery methods:

- ☒ On-Premises
- ☐ SaaS
- ☒ Hosted by Vendor

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CheckPoint research suite & many write-up applications

- Hosted & leased versions available as part of Virtual Office CS
- Barcode scanning imports information from W-2s & K-1s for lower complexity returns while supporting complex features requiring manual entry like K-1s with special allocations at the same time
- New for 2010, UltraTax can automatically e-mail clients when returns are accepted for e-filing with tax authorities
- Highest electronic filing acceptance rates for 2008 & 2009 tax years of all products reviewed

POTENTIAL LIMITATIONS:

- Scan & organize tools in the Thomson Reuters suite require users to also license FileCabinet CS or GoFileRoom
- Limited support for multi-office firms without using Virtual Office or Citrix/Terminal Services.

EXECUTIVE SUMMARY & PRICING:

UltraTax CS is a good fit for tax practices of all sizes and volumes. Several software delivery options are available to users. Users may elect to receive a traditional disc to load on a PC or server, may download the software directly from Thomson Reuters or, as previously noted, select a hosted solution. Pricing for the traditional CD/download-based option starts at \$2,375 for unlimited federal 1040 returns. Other federal and state modules are available on a per-return or unlimited basis. The hosted solutions are available through purchase or lease and are available at a set monthly fee.

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4.75 – INTEGRATION

- • **w/in publisher's own suite**
- • **w/tax research tools & guidance**
- • **w/other or external programs**
- • **w/practice management**
- • **w/external services**

4.5 – PAPERLESS WORKFLOW

- • **paperless creation**
- • **paperless open items**
- • **paperless review**
- • **access control for limiting access into returns**
- • **digital document storage/mgmt.**
- • **data import/output**

4.75 – REMOTE CAPABILITIES

- **portal**
- **remotes access**
- **1099 depot**
- **Outsourced document prep**

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