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Mary Girsch-Bock • Aug. 18, 2017



## Intuit – Lacerte Tax

**Accountants.intuit.com**

Lacerte Tax, from Intuit is a good match for accounting firms that perform tax-related services to both businesses and individuals. Lacerte can easily handle complex tax returns and offers seamless integration with QuickBooks applications.

From the **2017 Review of Professional Tax Preparation Systems**.

Lacerte Tax included a variety of updates for tax year 2016, including some slight changes in the appearance of input sheets, new forms and e-filings for a variety of states including Alaska, Iowa, New York, Wisconsin, and others. Beginning in 2016, Lacerte also implemented enhanced security measures, including the need for all

system users to log in, even sole proprietors, as well as an automatic log off after 30

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easy. Users can easily view all clients from a single interface, and offers direct access to all available forms, tools and resources.

Lacerte supports more than 5,700 forms including federal tax forms, including 1040, 1041, 1065, 1120, 1120s, 706, 709, 990, and 5500. The product also supports various schedules, and includes a variety of worksheets. Lacerte also supports state equivalent forms for all states that have an income tax.

Lacerte offers year-round e-filing, with no separate e-filing fees. In addition, over 50 e-file return types have been added in the 2016 edition of the product, including individual, partnership, corporations and fiduciary. The included e-filing wizard streamlines the entire process and for tax year 2017, Lacerte has added the ability for users to utilize e-Signature Plus Payments to send signature requests for other documents including business tax returns, consent forms, new client acceptance letters, power of attorney, and other vital documents.

With the use of SmartVault, accountants have access to a custom branded portal, which offers secure file sharing with clients. SmartVault also offers 24/7 online document storage, full text search for documents, and the ability to batch email clients if desired. Lacerte Tax Scan and Imp.

The Fast Path License includes a variety of workflow tools designed to simplify the tax preparation process, including the ability to download data from a variety of financial institutions, as well as the ability to download 1099-B, 1099-INT, and 1099-DIV directly from participating financial institutions. W-2 statements can also be downloaded. A transaction data reviewer is available that allows users to check and edit all documents prior to completing the importing process to ensure document accuracy.

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Payments, which allows accountants to receive client signatures on important documents electronically, while also proactively collecting client payment simultaneously. Also available is a Document Management System that offers accountants their choice of online document storage or local document storage. Finally, the Lacerte Tax Planner & Tax Analyzer offers added value to any firm, with the ability to compare multiple tax scenarios, generate custom graphs and reports for clients, and provide accountants with tax saving tips that they can pass along to their clients.

Lacerte offers free data conversion for any firm that moves to their application. Help functionality is found throughout the application, and users also have access to a variety of online resources including a robust online user community, FAQ's, and the Ask Lacerte library that offers a variety of tax topics to access and training tools. Phone and chat support is offered and included in the product pricing.

Designed for firms with complex needs, Lacerte offers a variety of packages that are sure to fit the needs of any firm. A Pay-Per-Return License is available for those processing a lower number of tax forms, and starts at \$360.00 per user per year. Lacerte 200 and Lacerte Unlimited are also available, with pricing for either option based on a customized solution from Intuit. Add-on modules are all priced separately, with add-on pricing available on the Lacerte website.

## 2017 Rating – 4.5

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