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Mary Girsch-Bock • Aug. 18, 2017

The image shows the TaxWise logo in a large, bold, green font. The word "TaxWise" is written in a sans-serif typeface, with a registered trademark symbol (®) to the upper right of the "e". The logo is centered within a white rectangular box.

## TaxWise

### Wolters Kluwer

TaxWise from Wolters Kluwer Tax & Accounting is a good fit for smaller firms that process a significant amount of tax returns. The program is bilingual, offering both English and Spanish versions, and an online version of TaxWise is available online for firms that only need to prepare 1040s.

From the [2017 Review of Professional Tax Preparation Systems](#).

TaxWise is installed on a local computer desktop or on a network. Users can also purchase the program online and download it using the download option that is emailed to users from TaxWise. Mentioned earlier, there is also an online version of TaxWise that only processes 1040s. During product setup, users can also choose to enter information that will allow future integration between TaxWise and CCH iFirm.

New in the latest version of TaxWise (2016), TaxWise now offers direct integration

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are used for entering tax data, with information entered shared with any corresponding schedules. TaxWise contains an 'Easy Interview' option, which works to guide users through the information collection process.

TaxWise offers a variety of tax packages including 1040, 1041, 1065, 1120C, 1120S, 5500, 706, 709, 990, and Miscellaneous. The product offers e-filing for federal forms as well as state 1040's in states that support e-filing. 1040, 1041, 1065, 1120, and 1120S, along with 1040 state forms for states that support e-filing. Selected states are also supported for other tax packages. Any electronic filing errors are displayed in red text in the diagnostics report, so users can easily correct any issues.

TaxWise offers seamless integration with PortalSafe from eFileCabinet. The optional program allows firms to easily upload client files to PortalSafe, where their clients can access them. Users can access PortalSafe from any location using any type of device, and all files are completely encrypted for added security.

Like ATX, TaxWise offers solid integration with Paperless Plus, which contains a series of features designed to reduce paper processing, including the ability to store emails, letters, reports, PDFs, photos, and any scanned documents. Used in conjunction with PortalSafe, mentioned above, users can store documents safely, then share them as needed. The use of an optional signature pad allows users to easily electronically sign any PDF documents.

Along with PortalSafe and Paperless Plus, TaxWise also integrates with Central Office Manager, which is a terrific solution for firms with multiple offices; offering central management of all offices from a single location, including the ability to manage and support all offices centrally. Integration with CCH iFirm also offers extended capabilities including integration with practice management, various bank products that offer unique settlement solutions including the ability to have tax preparation fees automatically deducted from a tax refund. Firms also have access to the

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TaxWise offers accountants a comprehensive tax compliance solution that is available as a locally installed application as well as online (1040 only). Available in both English and Spanish, the product is available in three versions; TaxWise Pay-Per-Return, which is \$549.00; TaxWise ProFiling, which focuses on federal and state returns and currently runs \$1,099; and TaxWise Power, which handles both individual and business returns and is available for \$2,499. Both the ProFiling and Power versions of TaxWise also include Central Office Manager, and all versions offer phone and chat customer support options.

## 2017 Rating: 4.75 Stars

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