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Company Overview

Founded in 2002 by a CPA, SurePrep's automated electronic workpaper solutions, forms recognition, automatic tax return population functions and onshore and offshore outsourcing options are used by nearly half of the top 100 accounting firms in the country. One of the keys to SurePrep's success has been its continued development and enhancement of its products and services to meet the constantly changing needs of the profession. The company's outsourcing options, which include U.S.-based, onshore preparation, have grown to accommodate increased demand, while continuing to provide secure tax return processing and bookmarked PDF workpapers organized in a preparation and review-ready format. With SurePrep's solutions, tax and accounting practices are given the ability to work smarter, not harder, increasing productivity and profitability, while promoting fully digital document retention. SurePrep's products and services have been used in the preparation of nearly 700,000 tax returns, and the company is committed to continuing its mission of developing technology and service solutions that aid the tax and accounting profession.

OCR Solutions

SurePrep's 1040SCAN suite of OCR tools gives CPA firms the ability to reduce time spent on antiquated manual processes and spend more time on value-added consultative work. Whether it's reducing the time spent organizing client source documents such as organizer pages, W-2s, K-1s and brokerage statements with 1040SCAN ORGANIZE, or adding the benefit of automatically generating an Excel-based schedule D report with 1040SCAN TRADES, or maximizing OCR efficiencies with the full-featured 1040SCAN PRO, SurePrep's OCR offering drives time savings to the CPA firm's bottom line.

Tax Outsourcing Services

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processes by enabling the professional to drilldown to source documents from leadsheets when reconciling tax return data. With Outsource Lite, firms can take advantage of many of these same benefits of Outsourcing but at a significantly reduced cost. Whether offshore or onshore, Outsource Lite better utilizes the firm's professional resources by capturing all of the data from the standard documents, allowing the firm's staff to focus on the more complex areas of the return. This service is perfect for those returns where knowledge of the taxpayer is required to properly prepare the return. The firm's staff simply verifies the information captured by SurePrep and completes the return with a preparation-ready electronic workpaper binder that is provided as part of the service.

SurePrep Express

SurePrep Express is a web-based workflow system that makes paperless tax preparation quick and easy while reducing review time by up to 25 percent. With electronic tools that mimic the paper world, SurePrep Express makes the transition from paper easier than ever before. The system not only speeds up the review process but also increases the accuracy of review by providing exception reports that assure completion, giving the firm electronic workpapers that include indexed and cross-referenced drilldown access to source documents. SurePrep Express also helps practice managers stay on top of critical issues, staff productivity and key business indicators. SurePrep Express Lite, a more streamlined version, is also available.

MARKETS SERVED

SurePrep is focused on providing professional tax and accounting firms with practical services and products designed to streamline workflow. From tax return outsourcing services to technologies for automating data capture and input, SurePrep's staff of developers and nearly 200 professionally trained preparers in the

United States and abroad are dedicated to helping its clients achieve greater

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prepare firms to take full advantage of all the products and services that the company has to offer. SurePrep's automated, modular training gives clients the flexibility of learning when it's most convenient for them. SurePrep's training methodology won the K2 Enterprise Quality Award in 2009 for professional education and consulting.

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Number of Employees: 200+

Year Founded: 2002

Technology

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

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