Canopy Tax

www.canopytax.com

From the 2019 reviews of professional tax preparation systems.

Canopy offers a completely integrated tax and practice management platform designed for accounting firms of any size. Modules currently available from Canopy include Practice Management, Tax Resolution, and the new Notices module. The Notices module allows accountants to quickly answer questions regarding any notices received from the IRS. Step by step instructions are provided for each notice, with the product containing a series of resolution templates designed to provide answers quickly. Letter templates are also available, allows firms to respond to notices quickly.

Users can access the status of each notice received from the Management Dashboard, with users able to choose from an array of status options including In Progress, Review, On Hold, Completed, and Waiting on Client. Users also have the option to create and assign a custom status if desired.

Due to be released in Summer 2019, Canopy will also be introducing their new Tax Prep module. The new Tax Prep module will seamless integrate with other Canopy modules to form a complete practice management application. Tax Prep, like other Canopy modules, features an intuitive user interface, with users able to access hot keys when preparing returns. Tax Prep will also feature a tax organizer, e-filing capability for both federal and state forms, and eSign capability for Form 8879. Users

will be able to track the status of all e-filed forms, and as an online application,

to easily manage all client data from a single location.

Canopy's New Notices module is $899 per user, per year; the Tax Resolution module is $1,399 per user, per year; and the Practice Management module is $999 per user, per year. Pricing for the new Tax Prep module, due out this summer, has not yet been released. All modules include Contact Management, Client Portal, and Secure File Transfer capability.

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