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PRODUCT & SERVICE GUIDE

2019 Overview of Taxfyle

Taxfyle is designed for both consumers and accounting firms; connecting consumers with tax professionals who will prepare and file their taxes on demand. Taxfyle is an excellent alternative to do-it-yourself tax applications that put the ...

Mary Girsch-Bock • Jun. 11, 2019



Taxfyle

<https://Taxfyle.com/outsourcing>

From the 2019 reviews of professional tax preparation systems.

Taxfyle is designed for both consumers and accounting firms; connecting consumers with tax professionals who will prepare and file their taxes on demand. Taxfyle is an excellent alternative to do-it-yourself tax applications that put the preparation burden on the taxpayer alone by combining on-demand tax preparation capability with experienced tax practitioners to create a unique application.

Consumers interested in using Taxfyle simply answer a series of questions. Once the questions are answered, the customer receives a quote for the tax preparation services. Taxfyle will also match customers with a tax professional. Once that match has been facilitated, customers then begin the process of sending the required documents needed in order to prepare the return. Once the return is completed, customers can sign the return using their mobile device, which allows the tax professional to then file the return.

But perhaps the biggest advantage that Taxfyle offers is reserved for CPA firms, particularly firms that find themselves frequently overwhelmed during the tax season. Here are just a few of the challenges that many firms find themselves dealing with during the tax season:

- Finding and retaining qualified staff
- Maintaining a fair workload/overworked staff
- Dealing with new clients while continuing to keep current clients happy
- Ensuring that new staff are keeping up with tax changes

If you're tired of dealing with these challenges, it may be time to learn more about Taxfyle's outsourcing capabilities that are designed to significantly reduce firm workload during tax season while also ensuring that client taxes are being completed by professionals and filed timely.

Using Taxfyle, firms have the option to submit one return or thousands, receiving an immediate quote for any returns submitted. One of Taxfyle's best features is their ability to match a firm with a professional that uses the same tax platform, making it easy to share client information and related documents. Platforms available include:

- Wolters Kluwer CCH ProSystem *fx*
- ATX
- Taxwise
- Axxess Tax
- Drake Tax
- Intuit Lacerte Tax
- ProConnect Tax Online
- ProSeries Tax
- MyTaxPrepOffice
- TaxAct Professional
- TaxSlayer
- Thomson Reuters UltraTax CS

- GoSystem Tax RS

Taxfyle also includes document management and storage functionality that firms can utilize to easily upload related tax documents for their clients. And for firms that use a portal to collect source documents, they can opt to provide Taxfyle with access to the portal, eliminating the need to upload documents separately. Taxfyle guarantees that all work will be completed by professionals in the U.S, using only CPAs or Enrolled Agents (EAs) who have met strict licensing requirements for their particular designation.

Firms are able to log into Taxfyle at any time to view the current status of any client return that has been forwarded to them. Firms can also view a history of all communications that have taken place for both open and closed jobs. Firms won't have to worry about keep their client's documents secure in Taxfyle, as all information is encrypted both during transit, and while stored. In addition, the Taxfyle database maintains a secure environment that complies with advanced encryption standards. If you're tired of increased payroll costs and lower profit margins, Taxfyle may be the product that your firm has been looking for. For more information on Taxfyle, visit their website at <https://taxfyle.com/outsourcing>.

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