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**PRODUCT & SERVICE GUIDE**

# 2019 Review of ProSeries Tax by Intuit

Mary Girsch-Bock • Jun. 11, 2019



**ProSeries Tax**

**Intuit**

## From the 2019 reviews of professional tax preparation systems.

ProSeries Tax from Intuit is well-suited for small to mid-sized accounting firms that prepare both individual and business returns for clients. ProSeries currently offers two plans; ProSeries Basic for firms handling 1040 forms exclusively, and ProSeries Professional, for firms that regularly handle both 1040 forms and business forms. The Professional edition of ProSeries Tax also allows users to import data directly from QuickBooks Desktop applications into the application.

ProSeries Tax is available as a desktop or network application that can be installed on workstations, and does not currently offer cloud access or mobile apps.

ProSeries Tax offers a variety of resources to simplify form preparation including on-screen help, which allows users to access help while they are entering data into a form. The 'Where Do I Enter' feature makes it easy to locate the correct form for the data that needs to be entered. Users can also transfer data from business forms directly to an individual return using the data import options included in the application. A variety of keyboard shortcuts are also available, and a wizard is available that helps maximize deductions for clients. The Professional version of ProSeries Tax also includes a Tax Planner to maximize services offered, and both editions of ProSeries Tax allow users to download documents and data from client financial institutions.

ProSeries Tax supports more than 3,600 forms and schedules, including 1040 forms, unlimited returns for all states where filing is required as well as unlimited Federal and State Business returns, including forms 1120, 1120S, 1065, 1041, 990 and unlimited Gift and Estate Returns (706 and 709).

ProSeries Tax offers complete e-file capability, with users able to easily manage the status of all e-filed returns. Client Status can be viewed on the ProSeries homepage with users able to view related client worksheets by simply clicking on their file. The Client Intuit Link, included with ProSeries Tax at no additional cost, is a secure online portal that makes it easy for firms and clients to share confidential files safely and securely. The portal can be custom branded for each firm and includes numerous features such as automated client reminders, custom email templates for each client, and the ability to invite clients to sign up for Link. In addition to sharing documents, Link can be used to submit client questionnaires and request specific documents, with users able to track the progress of any request made using Link.

Data can be imported into ProSeries Tax from QuickBooks Desktop applications. The product also offers seamless integration with the ProSeries Organizer, an optional module that allows users to easily carry prior year client totals forward for automatic data population, reducing the amount of data entry considerably. Firms can also create a client organizer for new clients, making it easy to quickly collect necessary data from each client. Other integrations available in the Professional edition of ProSeries Tax include the Tax Scan and Import feature that allows users to automatically import data into client 1040 returns from financial institutions or from scanned source documents. The Tax Scan and Import feature includes a form reviewer tool that is used to check and edit documents as needed.

Firms can also collect client signatures electronically using the eSignature option, and the Network Sharing option allows multiple staff to access client files from a single stored location. Both the Basic and Professional editions of ProSeries Tax integrate with the Pay-by-Refund feature, the e-signature feature, mentioned earlier, and the Financial Institutions Download, which can be used to automatically import financial documents such as forms 1099-B, 1099-INT, and 1099-DIV directly into ProSeries Tax.

The Community and Support page in ProSeries Tax offers good support options, including a series of topics that users can browse through, the ability to post a question, installation and setup assistance, and access to a variety of add-on applications. Telephone, email, and chat support is available in ProSeries Tax, with all support costs included in the price of the subscription.

Well-suited for very small to mid-sized firms that process both individual and business returns for their clients, ProSeries Tax offers two product options; ProSeries Basic for those that prepare individual returns exclusively, and ProSeries Professional, for firms that process both individual and business returns. Basic Unlimited, which offers processing for an unlimited number of 1040 forms, is \$1,109 per year, while 1040 Complete, which supports both 1040 returns along with business returns, is currently priced at \$1,899.00 per year. A Pay-Per-Return option is also available, as is the Choice 200 plan which is priced at \$1,549 per year, and is designed for firms that process less than 200 returns annually.

## **2019 Rating – 4.5 Stars**

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