

CPA Practice Advisor

APRIL 2020

VOLUME 30
NUMBER 3

Today's Technology for Tomorrow's Firm

16TH ANNUAL

READERS' CHOICE AWARDS | 2020

CPAPracticeAdvisor.com

16TH ANNUAL

THE RESULTS ARE IN: READERS' CHOICE AWARDS 2020

By Isaac
M. O'Bannon,
Managing
Editor

TECHNOLOGY HAS PLAYED a vital role in the evolution of the accounting and tax profession over the past 30 years. Fortunately, accounting firms have largely embraced hosted and cloud-based systems that are making it easier for their staff to work remotely during the current Coronavirus pandemic.

These remotely-accessible technologies have reached into virtually all of the service areas that firms offer, as well as the management systems used by firms internally and for productivity. Likewise, many firms have helped their clients adopt cloud technologies that enable accountants to access live data

without transferring files or office visits.

CPA Practice Advisor Readers' Choice Awards, now in their 16th year, give our readers the chance to spotlight the technologies they most respect and trust to provide client services, to manage their firms, and to help their clients run their businesses. From online programs for tax and accounting functions, to document automation and workflow management processes, as well as tools for collaboration, mobile productivity and office hardware.

The awards also let professionals see the technologies and best workflow practices their peers are using, which can help them stay competitive in the constantly-evolving tax and accounting space. Thank you to the thousands of readers who participated in voting this year. Now, on to the results!

IN-FIRM TECHNOLOGIES

FEDERAL/STATE INCOME TAX PREPARATION

INSIGHT: Always our most active category, nearly all of this year's Readers' Choice voters reported using or recommending a professional tax system. Drake Software has consistently dominated this and other tax-related categories in the annual awards, and they did so again this year, thanks in large part to the company's very active and loyal customers.

Drake Tax Software: 40%

Intuit Lacerte, ProSeries or TaxOnline: **23.2%**

Thomson Reuters UltraTax or GoSystem RS: **8.8%**

Wolters Kluwer CCH Small Firm Services

ATX or TaxWise: **8%**

Wolters Kluwer CCH Axxess or ProSystem fx: **6.4%**

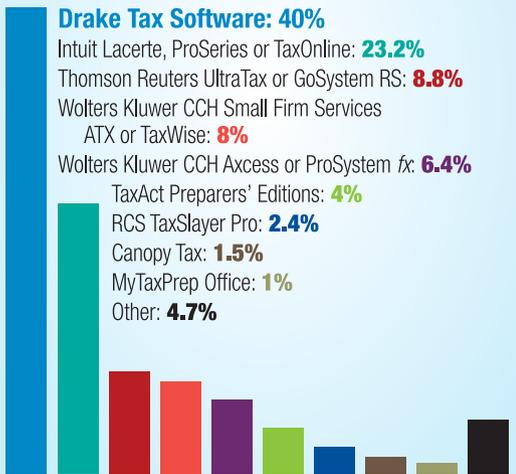
TaxAct Preparers' Editions: **4%**

RCS TaxSlayer Pro: **2.4%**

Canopy Tax: **1.5%**

MyTaxPrep Office: **1%**

Other: **4.7%**



TAX PLANNING SYSTEMS

INSIGHT: With major tax law changes coming almost annually (and certainly in the forecast for this turbulent year), tax planning is very valuable to clients, helping to identify potential issues that result in direct, identifiable tax savings that clients see and appreciate. These systems go far beyond what tax preparation systems can do when it comes to creating hypothetical situations based on current and projected tax law, phase-ins and outs, and life event changes such as variations in income, college and other family matters.

WINNER: Drake Tax Planner (45.6%)

RUNNERS UP:

- Intuit Lacerte Tax Planner (24.7%)
- Thomson Reuters Checkpoint or Planner CS (10.2%)
- Wolters Kluwer CCH ProSystem fx Planning and fx for Small Firms (6.9%)
- Bloomberg TaxWincome Tax Planner (6.7%)
- Other (5.9%)

SPECIALTY SYSTEMS & TAX PREP TOOLS

INSIGHT: Some firms have additional needs when it comes to taxes, whether for uncommon returns or for their practice's workflow process. So, they turn to specialty systems.

WINNER: QuickBooks Self-Employed (23.2%)

RUNNERS UP:

- GruntWorx (19.5%)
- Canopy Tax Resolution Services (7.9%)

- Wolters Kluwer CCH ProSystem fx Suite Scan w/AutoFlow (7.8%)
- Wolters Kluwer CCH Axxess (7.6%)
- Thomson Reuters UltraTax CS Source Document (7%)
- SurePrep 1040SCAN & TaxCaddy (4.6%)
- Taxfyle (4%)
- Bloomberg Tax 709 & 706 Preparer (2.7%)
- Xero Tax Touch (1.1%)
- DynaTax (1%)
- Sageworks (1%)
- Other: (12.6%)

TAX DOCUMENT AUTOMATION

INSIGHT: These systems help tax firms do more with less, by removing much of the tedious data entry work. The data automatically flows into the tax prep system after it is scanned. Some of these programs also prepare digital workpapers.

WINNER: Intuit Tax Import for Lacerte & ProSeries (27.56%)

- GruntWorx Populate (26.73%)
- Thomson Reuters Source Document Processing & Workpapers CS (9.1%)
- Wolters Kluwer CCH iFirm and ProSystem fx Scan with AutoFlow (8.4%)
- Canopy Tax (8.3%)
- cPaperless (4.5%)
- SurePrep 1040Scan Pro, 1040Scan Organize (3.7%)
- Other (11.8%)

TAX & ACCOUNTING RESEARCH SYSTEMS

INSIGHT: Professionals can't prepare taxes or help clients plan for future scenarios unless they know some tax code and strategies. Of course, nobody can know everything, so it's important to have access to comprehensive tax research tools. This includes primary source material such as the federal tax code and state tax laws, as well as tax court rulings and expert analysis of these materials. Some of the available tax research systems integrate with tax preparation programs, while others are used separately and can be used alongside any system. TheTaxBook once again handily won this category this year for its popular and inexpensive system.

TheTaxBook – Tax Materials Inc.: 52.6%

Thomson Reuters Checkpoint (RIA): **9.7%**

QuickFinder Tax Handbooks: **8.2%**

Intuit Tax Research & TaxAlmanac.org: **5.5%**

CCH IntelliConnect (Wolters Kluwer): **5.1%**

Parker Tax Pro Library : **4.8%**

TaxSpeaker: **4.2%**

Bloomberg Tax Financial: **3.9%**

Tax Talk Today: **2.3%**

Other: **3.7%**



SALES & USE TAX PREPARATION

INSIGHT: Trying to keep up with sales taxes can quickly become an overwhelming task, particularly with new rules relating to the U.S. Supreme Court's Wayfair decision. Many systems automate much of the compliance and reporting processes, including filing and payments. Most voters in this category (22%) said they use state tax agency websites or use the sales tax functions built into accounting systems (35%). However, among the votes for specific sales tax software, the results are:

WINNER: *Avalara AvaTax, Avalara Returns, or TrustFile (25.6%)*

RUNNERS UP:

• CFS Tax Software (11.7%)

• TaxJar (9.7%)

• Vertex Inc. (9.3%)

• Thomson Reuters ONESource Indirect Tax (9%)

• CCH Wolters Kluwer (SureTax/SalesTaxOffice/SalesTaxSaaS/STRO) (8%)

• Bloomberg Tax Sales Tax Rates (4.9%)

• eFileSalesTax.com (4.8%)

• Sovos Tax Solutions (1.1%)

• Other (15.9%)

SALES & USE TAX EXEMPTION CERTIFICATE MANAGEMENT

INSIGHT: Businesses who occasionally or routinely make sales to purchasers who are exempted from sales taxes can face another challenge that can lead to significant fines if the exemption certificates for those customers are not properly maintained. Although most firms in our survey did not express a preference or personal use with these products,

those who do voted as follows:

WINNER: *Avalara CertCapture (33.4%)*

RUNNERS UP:

• Vertex Inc. Exemption Certificate Manager (26.2%)

• Thomson Reuters ONESOURCE Exemption Cert. Manager (21%)

• Sovos Tax Solutions 5.9%

• Other (13.5%)

ACCOUNTING WRITE-UP SYSTEMS

INSIGHT: Write-up has been fundamentally changed by the increasing adoption of web-based accounting systems, but since small businesses are frequently victims of bookkeeping and employee fraud (and just bad bookkeeping), your business clients still need periodic review and reconciliation of accounts by a professional public accountant.

WINNER: *Intuit QuickBooks Accountant (53.8%)*

RUNNERS UP:

• Drake Accounting (17.3%)

• PC Software Accounting Inc. (7.5%)

• Thomson Reuters Accounting CS (5.2%)

• Xero (3.2%)

• Sage One (2.1%)

• Client Accounting Suite (Wolters Kluwer) (1.9%)

• AccountantsWorld Accounting Power (1.7%)

• UBCC Real Time Accounting (0.4%)

• CYMA Systems (0.3%)

• Other (6.6%)

AUDIT ENGAGEMENT TOOLS

INSIGHT: Audit engagements once took weeks or more, but now are much more streamlined thanks to automation and workflow tools, as well as other functions that provide for greater controls.

WINNER: *Thomson Reuters Workpapers CS, AdvanceFlow or Checkpoint (26.8%)*

RUNNERS UP:

• Wolters Kluwer CCH ProSystem fx Systems and ARM (20.2%)

• AuditFile (9.6%)

• Audit Confirmations (8.1%)

• Confirmation.com (7.4)

• CaseWare IDEA (5.2%)

• Teammate Analytics (3%)

• Capital Confirmation (2.6%)

• Audit Dashboard Automated PBC (2.3%)

• Wiley Advantage Audit (1.9%)

• Rivio Clearinghouse (1.5%)

• Other (11.4%)

FIXED ASSET MANAGEMENT

WINNER: *Thomson Reuters Fixed Assets CS (27.7%)*

RUNNERS UP:

• Intuit ProSeries Fixed Asset Manager (25.7%)

• Wolters Kluwer CCH ProSystem fx Fixed Assets & Fixed Asset Manager (13.2%)

• Sage FAS Asset Accounting (7.3%)

• Pro-Ware Asset Keeper (6.8%)

• Bloomberg Tax Fixed Assets (4.1%)

• Wasp Barcode Technologies (1.5%)

• Real Asset Management Inc. (1.2%)

• MultiView Asset Management (0.7%)

• Open Systems (0.7%)

• Other (11.1%)

BUSINESS VALUATION

INSIGHT: Accounting and tax professionals involved in business transfers, divorce litigation and family wealth planning often find a need for assessing the value of a business entity. This is, admittedly, a small niche among accounting firms served by a few technology vendors. About 10% of our voters had a preference in this category.

ValuSource Pro, BVM Pro & Express Business Valuation: 42%

SageWorks Valuation Solution: **22.3%**

MoneySoft Corporate Valuation Pro, DealSense & Business Valuation Specialist: **14.7%**

ValuAdder: **7.7%**

Other: **13.3%**



PAYROLL

INSIGHT: Payroll is the most outsourced business process, as evidenced by the sheer number of products in this category, and we couldn't even include them all. There are so many systems on the market that are designed for accounting firms or for small businesses to use directly. Cloud-based systems now automatically update payroll tax rates and other factors, even preparing monthly, quarterly and annual reporting, taking much of the pain out of payroll, making it much easier to keep employees and clients happy.

WINNER: *QuickBooks Payroll - by Intuit* (31.2%)*

RUNNERS UP:

• Drake Accounting (11.3%)

• ADP Payroll Solutions (10.7%)

• Paychex (7.3%)

• Gusto Payroll (7%)

• PC Software Accounting Inc. (6.1%)

• Thomson Reuters Accounting CS Payroll or myPay (4.3%)

• AccountantsWorld Payroll Relief (1.8%)

• AMS 1099-Etc Payroll (1.8%)

• Sage 50 (1.7%)

• SurePayroll (1%)

• OnPay (1%)

• Other (14.8%)

* QuickBooks Payroll - by Intuit includes QuickBooks Online Self Service Payroll, QuickBooks Online Full Service Payroll, QuickBooks Desktop Enhanced Payroll, and QuickBooks Desktop Assisted Payroll.

1099/W-2 COMPLIANCE

INSIGHT: Year-end payroll (and contractor) compliance systems that prepare W-2 and 1099 forms and can automatically file them, can help relieve much of the burden of processing hundreds or thousands of forms for your clients each year. Some systems also help streamline the entire process, including mailing of copies to recipients. Drake Accounting won this year's voting, with its integrated W-2 and 1099 compliance functions.

FEATURE

WINNER: *Drake Accounting (25.3%)*

RUNNERS UP:

- eFile4Biz (9.1%)
- Thomson Reuters Accounting CS Payroll Compliance (8.3%)
- AMS 1099-ETC (8%)
- Track 1099 (8%)
- W2/1099 (Wolters Kluwer ATX and TaxWise) (6.1%)
- EagleView (5.8%)
- 1099 Pro (5.5%)
- Greatland/Yearli (5.5%)
- Tenenz (4.3%)
- W2 Mate (Real Business Solutions) (3.9%)
- Payroll Compliance Reporting Wolters Kluwer (3.5%)
- AccountantsWorld ATF Payroll (2.5%)
- EG Systems (1.1%)
- Others (3.1%)

TIME & BILLING

INSIGHT: Managing time for firm staff and projects is critical for firm efficiency, with the end product of invoicing helping ensure steady revenue flow. Effective time management is essential whether firms bill by the hour for some projects or are strictly on a value billing method.

TSheets by QuickBooks: 42.9%

OfficeTools Workspace by AbacusNext: **12.1%**

Sage Timeslips: **10.5%**

Bill.com: **10.2%**

ImagineTime: **6%**

TPS Software: **5.3%**

AccountantsWorld Practice Relief: **4%**

PracticeEngine: **2.6%**

ClockShark: **2.3%**

Bill4Time: **1.7%**

Other: **2.4%**



PRACTICE MANAGEMENT

INSIGHT: We define practice management as those with more extensive functions for managing firm productivity and workflow management, automation of tasks, and record maintenance.

WINNER: *Thomson Reuters Practice CS (27.9%)*

RUNNERS UP:

- Wolters Kluwer CCH Axxess, iFirm or ProSystem fx Practice (21.3%)
- ClientWhys/TaxBuzz.com (15.9%)
- Canopy Tax Practice Management (15.1%)
- Karbon Workflow Management (7.8%)
- TaxWorkFlow (4.7%)
- BQE Core or Core AI (2%)
- Other (5.3%)

ONLINE INVOICING/ BILL PAYMENT SOLUTIONS

INSIGHT: Stand-alone invoicing tools can help firms with AR, while bill payment systems can help streamline AP.

WINNER: *Intuit Payments (43.5%)*

RUNNERS UP:

- PayPal (18.1%)
- Sage Payments (2.7%)
- Bill.com (15%)
- Bill & Pay (2.3%)
- Xero (7.5%)
- FreshBooks (1.6%)
- ReceiptBank (4.6%)
- CollBox (1.6%)
- Invoiced (2.7%)
- Zoho Books (0.4%)

CLIENT PORTALS

INSIGHT: Please don't send client invoices by email, as it's insecure and you could be breaking your state's privacy laws and face fines. Client portals make sharing data with clients easier, and make it easier for them to submit documents to the firm.

WINNER: *Drake Software SecureFilePro.com (35.5%)*

RUNNERS UP:

- Citrix ShareFile (12.4%)
- eFileCabinet SecureDrawer (9.7%)
- Thomson Reuters NetClient CS Portals or Onvio (7.4%)
- SmartVault (6.6%)
- ClientWhys/TaxBuzz.com (6.4%)
- Wolters Kluwer CCH Axxess Portal/ProSystem fx / iFirm (5.5%)
- Canopy Tax (4%)
- CPASiteSolutions (4%)
- cPaperless SafeSend Returns (3.4%)
- OfficeTools from AbacusNext (2.1%)
- AccountantsWorld CyberCabinet (1.3%)
- Other (1.7%)

DOCUMENT MANAGEMENT & DOCUMENT STORAGE

INSIGHT: There is a wide range of systems in this category, ranging from basic file folders, to advanced programs that include client collaboration tools, automatic archiving, retention functions and multi-worker productivity features.

WINNER: *Drake Document Manager (44.8%)*

RUNNERS UP:

- Thomson Reuters FileCabinet CS/GoFileRoom (12.4%)
- eFileCabinet (10.8%)
- Intuit ProSeries & Lacerte DMS (10.3%)
- SmartVault Document Storage (6%)
- ClientWhys/TaxBuzz.com (4.1%)
- Wolters Kluwer CCH Axxess or ProSystem fx Document (4%)
- OfficeTools WorkSpace by AbacusNext (2.8%)
- AccountantsWorld Cloud Cabinet (1.6%)
- Doc.IT - Doc.IT DM (1%)
- PaperlessPLUS (Wolters Kluwer) (1%)
- Other (1.2%)

OTHER DOCUMENT MANAGEMENT TOOLS

INSIGHT: Document management also requires special tools that sometimes work with the scanner or work with the document management system directly for functions including OCR.

WINNER: *Fujitsu (41.1%)*

RUNNERS UP:

- HP (19.3%)
- Nuance (7%)
- Canon (15%)
- Kofax (4.1%)
- cPaperless Tic-Tie-Calculate (10%)
- ABBYY (3.5%)

COMPREHENSIVE FIRM WORKFLOW SYSTEMS

INSIGHT: This category is divided into two groups: Comprehensive Workflow, and Other Workflow Tools, which are designed for aiding in specific tasks and engagements and for smaller firms.

COMPREHENSIVE WORKFLOW

WINNER: *Thomson Reuters Practice CS Project Management (29.5%)*

Runners Up:

- OfficeTools WorkSpace by AbacusNext (24.3%)
- Wolters Kluwer CCH Axxess or iFirm (17.8%)
- XCM Workflow (11.2%)
- TaxWorkFlow (9.5%)
- Pascal Workflow (5.3%)
- Autonomy iManage Workflow Manager (2.4%)

OTHER WORKFLOW TOOLS:

WINNER: *GruntWorx (19.4%)*

RUNNERS UP:

- eFileCabinet (12%)
- Intuit Tax Import or DMS for Lacerte and ProSeries (10.6%)
- Citrix ShareFile for Accountants (10.4%)
- Thomson Reuters GoFileRoom/Practice CS/Workpapers CS (8.7%)
- Bill.com (7.6%)
- Canopy Tax (5.6%)
- Expensify (5.4%)
- SmartVault (4.7%)
- Wolters Kluwer CCH ProSystem fx Systems (4.5%)
- OfficeTools WorkSpace by AbacusNext (3.8%)
- SurePrep (2.4%)
- Karbon Workflow Management (2.4%)
- Doc.IT (1.1%)
- Other (1.4%)

WEBSITE BUILDERS & SERVICES FOR ACCOUNTING FIRMS

INSIGHT: There are many tools out there that are affordable and make it easy to create (and maintain) a professional website for your firm.

WINNER: *CPA Site Solutions from ProSites (16.6%)*

Runners Up:

- GetNetSet (16%)
- Drake SiteDart Website Services (15.7%)
- CountingWorks/ClientWhys/TaxBuzz (14%)
- Thomson Reuters Web Builder CS (10%)
- AccountantsWorld Website Relief (7.1%)
- Tenenz AFSB or Integer (5.7%)
- Wolters Kluwer CCH ProSystem fx SiteBuilder (3.9%)
- Rootworks (3.7%)
- CPASites.com (3.3%)
- Build Your Firm (3%)
- Network Management Group (NMG) WebCare (1%)

FAVORITE CPE PROVIDER

INSIGHT: Whether keeping up on the latest change in tax, A&A, firm management or technology, earning CPE credit is mandatory for CPAs.

WINNER: *State CPA Societies/Other Professional Organizations (56.5%)*

RUNNERS UP:

- AICPA (13.2%)
- CPA Practice Advisor (10.6%)

Our staff is so happy that we're in the cloud. I think it's exactly times like these when you really sit back and appreciate what this service gives us.

Lynn Blass, Operations Manager at LWBj



The #1 Cloud-Based **Outsourced Technology Service** For CPA Firms

Right Networks Cloud Premier is the *only* solution that combines accounting application expertise with managed IT.

That's what makes us the top choice for CPAs – and we're committed to staying that way.

Learn More

rightnetworks.com
1-866-923-6874 x2
sales@rightnetworks.com



FEATURE

- Surgent CPE (5.5%)
- CPAcademy (4.5%)
- Canopy Tax CPE (3.9%)
- NASBA (3.6%)
- Becker CPE (2.2%)

HOW DO YOU PREFER TO EARN CPE?

INSIGHT: There are many ways to earn CPE: online, through conferences, through paid events, and via state societies.

WINNER: *In-Person Seminars/Conferences (34.8%)*

RUNNERS UP:

- Live Online Webcasts (31.2%)
- Self-Study with Tests (28%)
- Other (6%)

WHICH CONFERENCES DO YOU ATTEND?

INSIGHT: Although many may be postponed or canceled this year, professionals frequently attend conferences to learn of new tax and accounting laws and trends, firm management issues and technologies. Most voters (apx 64%) stated they attend state conferences or “other,” but of those who voted for a specific conference, the results are:

WINNER: *QuickBooks Connect (21%)*

RUNNERS UP:

- AICPA ENGAGE (Las Vegas) (12%)
- NAEA National Conference (11%)
- Scaling New Heights (8.7%)
- Thomson Reuters Synergy (7%)
- New York Accounting Show (6%)
- CCH Connections (5.5%)
- FICPA- Florida (5.3%)
- LA Accounting Show (4.5%)
- XeroCon (3.8%)
- AICPA Digital CPA (3.8%)
- ICPA Summit Chicago (2.8%)
- New Jersey Accounting Show (2.8%)
- Sage Summit (2.2%)
- Avalara CRUSH (1.7%)
- Toronto Accounting Show (1.1%)
- Sage Intacct Advantage (0.8%)

SMALL BUSINESS

ACCOUNTING SYSTEMS

INSIGHT: There are several sub-categories in this group: Below are the top vote-getters in each category.

SMALL BUSINESS ACCOUNTING

INSTALLED PROGRAMS

WINNER: *Intuit QuickBooks Desktop (76.9%)*

RUNNERS UP:

- PC Software Accounting Inc. (9.3%)
- Sage One, Sage 50 or Sage ERP (5.4%)
- Other (8.4%)

ONLINE SMALL BUSINESS ACCOUNTING

WINNER: *Intuit QuickBooks Online/Online Accountant (76.6%)*

RUNNERS UP:

- Xero (5.2%)
- Thomson Reuters Client CS or CS Client Access (2.4%)
- AccountantsWorld Accounting Power (1.6%)

- SageOne (1.6%)
- Sage Intacct (1.6%)
- NetSuite (1.3%)
- FreshBooks (1.2%)
- Other (8.5%)

EXPENSE AND TRAVEL MANAGEMENT

SOLUTION

INSIGHT: Travel and expense management is a critical financial management function in organizations. About 16% of voters claimed an alternate method (including spreadsheets), but of those who cast a vote for a true expense management solution, the results are:

WINNER: *Expensify (45.4%)*

RUNNERS UP:

- ReceiptBank (18.4%)
- Concur Expense (16.7%)
- SpringAhead (4%)
- Certify (2.9%)
- Chrome River (2.9%)
- ExpensAble (2.3%)
- ExpenseWatch (2.3%)
- Xpenditure (1.7%)
- ZohoExpense (1.7%)
- Tallie (1.1%)
- SutiExpense (0.6%)

RETAIL ACCOUNTING/POINT-OF-SALE SYSTEMS

WINNER: *Square (40.1%)*

RUNNERS UP:

- Intuit QuickBooks POS (36%)
- NetSuite OnSite POS (3.8%)
- Database Creations (1.9%)
- AddSum (1.3%)
- Cougar Mountain Denali (1.3%)
- Radiant Systems (0.9%)
- Vend POS (0.6%)
- Wasp Barcode (0.6%)
- Celerant Command Retail (0.6%)
- AccuPOS (0.6%)
- Other (12.3%)

NOT-FOR-PROFIT ACCOUNTING

WINNER: *Intuit QuickBooks Premier Nonprofit (69.8%)*

RUNNERS UP:

- Sage Intacct (6.2%)
- Blackbaud Financial Edge or Fundware (3.1%)
- Cougar Mountain FUND Suite (2%)
- Other (18.9%)

REMOTE TECHNOLOGIES

ASP/HOSTED SOLUTION PROVIDERS

WINNER: *Drake Hosted (40.1%)*

RUNNERS UP:

- Right Networks/Xcentric (18.9%)
- Thomson Reuters Virtual Office CS/SaaS (17.6%)
- AbacusNext Private Cloud and Cloudnine Realtime (6.2%)
- CPAASP/InsynQ (2.5%)

- Network Management Group Inc. (NMGI) (2%)
- Network Alliance Inc. (1.2%)
- Cetrom CPA Cloud (0.8%)
- Other (10.7%)

OUTSOURCED TECHNOLOGY SERVICES

INSIGHT: About 24% of survey takers state a preference for a solution or practice not on the list, and each year we add products to the list of which we were previously unaware. Of the votes for the solutions listed, the results are:

WINNER: *Right Networks/Xcentric (43.6%)*

RUNNERS UP:

- CPA2Biz Email Solutions (15.9%)
- InsynQ/CPAASP (8.9%)
- AppRiver (8.9%)
- CollBox (7.9%)
- Network Management Group Inc. (NMGI) (6.9%)
- Cloudnine Realtime by AbacusNext (6.9%)
- Cetrom (1%)

PERSONAL TECHNOLOGIES

SMART PHONE PLATFORM

- Apple (52.56%)
- Android (44.77%)
- Other (2.67%)

TABLET OPERATING SYSTEM

INSIGHT: We were surprised that 27% of voters stated that they “don’t use” a tablet computer. (Multiple answers were allowed on this question.)

- Apple iPad (36.47%)
- Android/Google/Chrome (22.54%)
- Microsoft Surface (9.62%)
- Other (3.92%)
- Don’t Use (27.45%)

DO YOU HAVE A SMART TV?

INSIGHT: If your tv has an internet connection or wifi capability and can run some apps, then it is some variation of a smart tv.

- Yes (63.31%)
- No (36.69%)

GENERAL OFFICE TECH

PRINTERS & SCANNERS

INSIGHT: Printers are needed even in the “paperless” office.

- HP (34.5%)
- Canon (12.9%)
- Epson (7.2%)
- Brother (20%)
- Fujitsu (10.4%)
- Other (15%)

OFFICE SUPPLY STORE

(Multiple answers were allowed on this question):

- Office Max/Depot (25.1%)
- Sam’s Club (7.7%)
- Staples (22.6%)
- Quill (6%)
- Costco (11.9%)
- FedEx Office 1.9%
- Best Buy (9.8%)
- Other (6%)
- Wal-Mart (9%)

OUT-OF-OFFICE

FAVORITE FORM OF PHYSICAL EXERCISE DURING TAX SEASON

WINNER: "Who has time to exercise?" (32.4%)

- Weightlifting (9.5%)
- Jogging/Running (8.9%)
- Bicycling (8.4%)
- Jumping to Conclusions (7.5%)
- Aerobics (7.1%)
- Yoga (6.2%)
- Aerobics (4.8%)
- Team Sports (2.2%)
- Racket Sports (1.4%)
- Other (11.6%)

HOW REMOTE ARE YOU?

How "remote" are you? How many hours per week do you work on client engagements or firm business while away from the office (at a client, at home or anywhere else)?

1. "My office is in my home or car:" 40.8%
2. Less than 1 hour per week: 20.3%

3. Between 1-9 hours per week: 17.7%
4. Between 10-19 hours per week: 9.3%
5. 20+ hours per week: 11.9%

HOW "SOCIAL" ARE YOU? WHICH SOCIAL MEDIA TOOLS DO YOU USE IN CONJUNCTION WITH YOUR WORK?

About half of our voters said they don't use any social media tools for business purposes. Of those who do, the breakdown is as follows (multiple responses were allowed):

- Facebook 22.6%
- Twitter 21.1%
- LinkedIn 9.3%
- YouTube 7%
- Instagram 7.1%
- Google+ 4.7%
- Pinterest 3%
- Don't use any social media for business 18.4%
- Other 6.8%

THANK YOU TO THE MORE THAN 1600 TAX AND ACCOUNTING PROFESSIONALS WHO PARTICIPATED IN THIS YEAR'S READERS' CHOICE AWARDS.

**Voted #1
TAX RESEARCH PRODUCT!**

THANK YOU FOR VOTING!

CPA Practice Advisor
Today's Technology for Tomorrow's Firm

READERS' CHOICE AWARDS | 2020 WINNER

TTB TAX PRODUCTS



THE TAX BOOK



WEB LIBRARY

TheTaxBook delivers real answers, real fast! Save time, guaranteed. We compile the mountains of tax information, condense it for quick comprehension, and present it in a fast-answer format.
Use the #1 tax research product on the market!

thetaxbook.com | 866-919-5277

**Voted #1
8 YEARS
In A Row!**



"Dear Drake
Software
Competitor"



I switched to Drake Software a few years ago and am very happy I did. I left your company because your price was so extremely high. Drake has you beat not only in price, but their customer service is outstanding—direct phone conversations with real people. Thanks for reaching out, but I have become a loyal Drake user."

GAIL, VALUED DRAKE SOFTWARE CUSTOMER

DrakeSoftware[®]

Professional Tax Solutions | Since 1977

Toll-Free [866.923.8489](tel:866.923.8489) | Free Demo [DrakeSoftware.com](https://www.DrakeSoftware.com)

CPA Practice Advisor
READERS' CHOICE AWARDS 2020
WINNER