

## How to Choose the **Right Tax Software** for Your Business

Whether you are a sole practitioner, multi-office, or corporate firm, one of the toughest challenges can be making the right choice when it comes to choosing a software partner you know you can trust. You need to be confident that you are working with a reliable and accurate tax software solution with simple, but powerful tools aimed at making tax preparation fast and easy. The quicker you can prepare a return, the more time you can spend focused on the important aspects of your business...providing great service to your clients and increasing your profits.

Consider the following aspects when choosing tax software for your business.





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Finally I am working for a profit with the help of MyTAXPrepOffice.

*Maria Otero*

## Expensive Plans and Fees Can Eat Up Your Profits

Whether you are just starting your career as a tax professional or you are a seasoned expert, one of your largest yearly expenses could be the cost of your tax software. In addition, many tax software companies charge extra for each return filed and for returns filed in different states, as well as bank product, service, and technology fees. There can also be costs for specialty business modules, for access to the client portal, extra document storage, and additional users.

These hidden fees can add up and really eat into your profits at the end of your tax season. Be sure to not only consider the up front cost of the plan, but ask about any hidden or extra fees they may charge.

## Features to Keep in Mind When Choosing Tax Software

**MyTAXPrepOffice** offers all of these features at an affordable price:

- ✓ A low up front plan price
- ✓ Free unlimited e-filing
- ✓ Federal and all states
- ✓ Individual and business returns
- ✓ Ability to easily work remotely
- ✓ Free client portal
- ✓ Remote signature capabilities
- ✓ Integrated bank products
- ✓ Low bank product fees
- ✓ Free document storage
- ✓ Unlimited users



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MyTAXPrepOffice is easily accessible, very user-friendly, and the price is unbeatable.

*Brittany D.*



## Work from Anywhere, Anytime, on Any Device

### Not able to be in the office, but still need to work?

Unlike desktop software which is limited to one computer, **cloud-based or web programs** allow you to access your software from anywhere. With MyTAXPrepOffice, you can log in on your PC, Mac, tablet, or phone using any operating system including Windows, iOS, or Android. Our software runs on a browser, so your work stays synced on all of your logged in devices.

For quick and easy two-way communication between you and your clients, make sure you choose a tax software program with a **client portal**. With MyTAXPortal, you can create and send your engagement letters and client organizers, securely collect data and exchange documents with your clients, send returns for review, and collect **remote signatures**. Brand it with your logo for a professional look and access it on any device.

# Learn How to Grow Your Business

**Bank products** are a quick and easy way to add revenue to your tax season while giving your customers the option to pay their tax preparation fees with their refund. Bank products offer a variety of benefits:

- ✓ Attract new clients with additional service offerings
- ✓ Maintain a competitive edge in the market
- ✓ Let your clients choose the disbursement option that is best for them
- ✓ Take pressure off of clients by eliminating out-of-pocket expenses
- ✓ Eliminate collecting late payments or chasing after clients for non-payment



## Stay Competitive

Keep pace with the big box franchises by giving your clients a choice in how to receive their tax refunds.

- ✓ Refund Advance
- ✓ Pre-paid Card
- ✓ Cashier's Check
- ✓ Direct Deposit

MyTAXPrepOffice also provides its customers the ability to offer pre-acknowledgment, or **“pre-ack” loans** allowing qualified taxpayers to receive partial refunds even before the IRS has accepted their return.

MyTAXPrepOffice partners with three trusted financial institutions to give you the freedom and flexibility to find the best option for your clients. Our bank product applications are integrated within the program allowing fast data entry and smooth data flow. With the **lowest bank product fees** in the industry, growing your business has never been easier!

# Superior Productivity Tools

## ✓ MYTAXPORTAL

Enjoy quick and easy two-way communication. Securely exchange documents with your clients, send returns for review, and request signatures. Branded with your logo for a professional look.

## ✓ INSTANT FORM VIEW

Open the tax return in Instant Form View to see the actual form populating in real-time with the data you enter. Instant Form View can be opened on a second screen on your desktop or on any mobile device allowing you or your clients to preview work as it's happening.

## ✓ OFFLINE MODE

No internet? No problem. Work using real-time calculations, even if your internet connection is lost. Your data will automatically sync with your software once internet is restored.



## State-of-the-Art Security

Unlike other tax preparation programs which were created before internet security became a priority, our cloud-based program was created with **online data protection** at the forefront of its development. MyTAXPrepOffice meets or exceeds the latest security and data protection requirements published by the IRS. We use secure data centers and the latest encryption technologies in order to ensure that no unauthorized person can gain access to personal data at any time or by any means.

# Expert Support

**MyTAXPrepOffice is not just a tax preparation software.**

Behind this great product is a team of dedicated individuals working tirelessly to ensure that the one tool critical to your business success is seamlessly doing its job. MyTAXPrepOffice provides quality customer support with EA trained representatives and CPAs on staff to help with your most difficult tax software questions. It's crucial to have a support team you can count on, not only to guide you through the features and functionality of the software, but to answer your questions quickly during the busy tax season.

- ✓ 24/7 live chat during tax season
- ✓ Email and phone support
- ✓ Spanish support available
- ✓ 1-on-1 training sessions
- ✓ Live webinar trainings
- ✓ Extensive library of training videos
- ✓ Help integrated into the software

# Exclusive 1-on-1 Training

**When you purchase our software, we are invested in your success.**

Each new customer is assigned a software expert to take them on a tour of the software with a 1-on-1 customized training session. You'll be personally guided through set up and conversion, and trained to confidently use all the features and productivity tools that MyTAXPrepOffice has to offer.

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MyTAXPrepOffice has the best service and help in getting questions answered...I have been doing this for 30 years and have never seen such good help!

*William Traxler*





## About MyTAXPrepOffice

**At MyTAXPrepOffice, continuous improvement is not just a motto; it drives our brand ideals and values.**

MyTAXPrepOffice was conceived to fill a gap in the tax software industry for an online, cloud-based program that is technologically advanced and fills the unique needs of today's tax preparation environment.

Decades old, inflexible desktop programs still require cumbersome installation and downloads, lack mobility, and are more expensive. MyTAXPrepOffice requires no networking or downloads, is **completely mobile**, and provides a fast, accurate, and easy to use tax preparation software that is packed with all the productivity tools you need to run a successful tax business. We offer **affordable plans** for the one person tax office to preparers with multiple offices and numerous preparers. Paired with our client portal and financial product offerings, your business can be anything you imagine it to be.

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Our promise to you...  
relentless pursuit of  
maximum productivity.

*The MyTAXPrepOffice Team*