

ProSeries[®] Tax

An Intuit ProLine[™] Solution

Introduction

Leader in the industry with more than 65,000 customers, ProSeries Tax is efficient and affordable professional tax software designed to help preparers serve their clients quickly and confidently. ProSeries Tax is right for small to medium-sized practices and sole practitioners who focus primarily on tax and have low to medium complex returns. ProSeries Tax offers two distinct products depending on whether you are an experienced professional or just getting started preparing returns for clients.

ProSeries Professional Overview

ProSeries Professional tax software includes tools to help professionals run a more successful practice-beyond the return. Key features include:

- Comprehensive set of forms and schedules for individual and business clients.
- Workflow, navigation and forms-based data entry designed to speed you through returns.
- Automated calculations, diagnostics and built-in tax research to help prepare returns accurately.
- Free e-Filing for supported individual and business forms.
- Tight integration between Federal and State forms, plus QuickBooks and K-1 import help save you time by reducing data entry.
- Client Checklist helps you collect client information easier from year to year by generating an easy-to-understand list of the information you need from them to complete their return.
- Automatically generated with each return, Client Presentation provides a summary breakdown of the return for clients, including income and deductions, compared to prior years.
- Client Advisor generates a list of up to 71 recommendations to help clients lower taxes based on their existing tax data.
- Client Analyzer helps keep you up-to-date on the ever-changing tax law and allows you to quickly see which clients it impacts.
- Missing Client Information Utility helps you track down data you still need from clients via email and links you directly to the field to add it.
- Built-in tax research powered by BNA helps you find answers fast within the program and enables you to quickly attach the research to the return with one click (Intuit ProLine Tax Research sold separately).
- Intuit ProLine Tax Import[™] enables you to scan source documents and import the data directly into Lacerte, as well as download and import data from financial institutions saving you up to 30% off your tax preparation time (sold separately).
- Access to Live Community to ask questions and get answers from peers.
- Multiple ways for you to get product support free, either in-product, online, chat, email, or our toll-free U.S.-based technical support line with extended hours during key filing deadlines.

What's New in ProSeries for tax year 2010

- **Expanded e-File Offerings:** Dramatically expanded the number of business states and Fiduciary returns e-fileable in Lacerte, including Federal 1041; NY 1041; NYC 1120, 1120s, 1065; NJ 1065; AL 1041, 1120s, 1065.
- **More Forms:** Adding the most requested forms, including Corporate and Partnership forms for: ME, MT, ID, ND, WV and Vermont. Plus, building out formsets for: RI 1065; DE 1065, 1120; DC 1065.
- **Increasing Bank Product Capacity:** Added integration for Refund Advantage into ProSeries. Refund Advantage is greatly increasing its enrollment capacity for ProSeries users to accommodate increased demand for ERC/RT and RAL products.

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ProSeries Professional is right for practices that

- Are more experienced professionals and need less guidance through preparation.
- Prepare individual and/or business returns, most that are low to medium complexity.
- Prefer forms-based data entry to speed through return preparation.
- Run a small to medium-sized practices and/or are sole practitioners focusing primarily on tax services.
- Appreciate help acquiring and maintaining 1040 clients.

ProSeries Basic Overview

ProSeries Basic provides professional compliance and faster completion, yet is so helpful entry-level tax preparers gain the confidence they are filing returns correctly. Key features include:

- Easy-to-use tax preparation forms and schedules for individual clients.
- Guided workflows and checklists to help you prepare returns professionally.
- Built-in tax guidance and error-checking to help you prepare returns confidently.
- E-Filing included for no additional charge for supported forms.
- Access to Live Community to ask questions and get answers from peers.

ProSeries Basic is right for preparers that

- May just be getting started in professional tax preparation.
- Have a relatively low volume of returns.
- Prepare primarily individual Federal and State returns.
- Need frequent tax guidance to help prepare accurate returns.
- Want easy-to-use tools and professional output.

ProSeries Professional Pricing

PPR (Pay-per-Return) \$275.00 (Additional return fees apply)

- The pay-as-you-go option is perfect for a lower volume of specific types of returns, such as less than 33 individual 1040/State returns.
- Includes free e-filing, service and delivery.

1040 Complete \$1,499.00

- Unlimited individual bundle tailored for preparing more than 33 individual returns and a limited volume of business returns.
- Includes free e-Filing, 3 free uses of Intuit ProLine Tax Research, service, and delivery.

PowerTax Lite \$3,099.00

- Unlimited bundle of tax and add-on solutions designed for an increased number of business returns and more than 33 individual returns.
- Includes free e-Filing, 3 free uses of Intuit ProLine Tax Research, service, and delivery.

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PowerTax Library \$4,549.00

- A complete unlimited bundle of tax and add-on solutions built for a significant volume of individual and business returns.
- Includes free e-Filing, 3 free uses of Intuit ProLine Tax Research, service, and delivery.

ProSeries Basic Pricing

Basic 50 Returns + 2 States \$479.00

- (50) 1040 Returns
- (50) Individual State Returns across 2 states
- Includes e-Filing for supported forms, service and delivery

Basic Unlimited Returns + 4 States \$749.00

- Unlimited 1040 Returns
- Unlimited Individual State Returns across 4 states
- Includes e-Filing for supported forms, service and delivery

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