

TAXWARE TIMES

FALL 2025
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We are excited to announce a new partnership between **Taxware Systems** and **TheTaxBook**, the #1 tax research product in the nation as voted by CPA Practice Advisor readers every year from 2013-2025. This partnership brings our customers exclusive access to **WebLibrary Plus with TaxBert AI Tax Research Assistant** at a special discounted price of just **\$299 (regularly \$389)**. This offer is available only to Taxware clients and provides an invaluable resource for simplifying your tax research during the busiest season of the year.

With WebLibrary Plus and **TaxBert**, powered by TheTaxBook's rock-solid content, including IRS code, publications, and court cases, you'll enjoy faster, easier access to reliable tax answers. Ask questions in plain English, get clear explanations with sources-linked and chats saved. You can even draft client letters or emails in seconds. Now, with TaxBert being integrated directly into your Taxware software - including Wintax - you can launch it with a single click right from your workspace. It's like having a 24/7 tax research assistant at your fingertips, helping you save time, improve accuracy, and serve your clients more efficiently.

Purchase your subscription from our website here: store.taxwaresystems.com

Already a client of TheTaxbook? Please contact us so that we can help get you the Taxware pricing on this package and ensure both Wintax and TaxBert are connected to serve you best.



PREPARING FOR FUTURE TIP AND OVERTIME INCOME

The IRS has announced that no changes will be made to Form W-2 or other information returns regarding overtime and tip wages for Tax Year 2025, as part of the phased implementation of the One Big Beautiful Bill Act (OBBBA). This decision ensures stability for the upcoming tax season, allowing employers and payroll providers to continue using current procedures for reporting and withholding. For more details, visit the IRS announcement at [IRS announces no changes to individual information returns or withholding tables for 2025 under the One Big Beautiful Bill Act](https://www.irs.gov/irb/2024-48) | Internal Revenue Service.

However, the IRS is preparing for updates in Tax Year 2026, including changes to how tips and overtime pay are reported. To ensure a smooth transition, tax preparers should proactively develop procedures to collect accurate data on overtime hours, overtime pay, and tip income. These steps will help clients comply with future requirements and claim OBBBA-related tax benefits efficiently.

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PREPARING FOR FUTURE TIP AND OVERTIME INCOME CONTINUED

ACTION STEPS FOR TAX PREPARERS

1. **Collect Overtime Data:** Encourage clients to provide detailed records of overtime hours and pay. Sources such as the employee's final pay stub of the year or the annual report from their payroll service. These documents typically include cumulative overtime hours and earnings, which will be critical for accurate reporting under the new 2026 rules.
2. **Track Tip Income:** For clients in tip-based industries, such as hospitality, ensure they maintain precise records of tip income. Pay stubs or payroll service reports often summarize reported tips.
3. **Educate Clients:** Inform clients about the upcoming changes and the importance of maintaining consistent records. Provide guidance on how to access and organize data from pay stubs or payroll reports. Consider creating templates or checklists to streamline data collection.
4. **Stay Informed:** The IRS will release additional guidance for TY 2026 in the coming months. Regularly check for updates and participate in IRS webinars or industry training to stay ahead of new reporting requirements.

By establishing these procedures now, tax preparers can reduce errors, save time, and position their clients for success when the OBBBA changes take effect in 2026. Taking proactive steps today will ensure a seamless transition and help clients maximize their tax benefits.

BANK ENROLLMENT NOW OPEN!

Now is the time to enroll with your selected bank if you choose to provide bank products as an option for your clients to pay your tax preparation fees.

Bank Enrollment Applications will be submitted through your 2024 Wintax 1040 Program. Enrollment for all four banks is now fully integrated.

Instructions on how to begin your enrollment application can be found on our website using the link below.

taxwaresystems.com/bank-enrollment-instructions

For more information on the current programs and offerings for the upcoming tax season we have linked the banks on our website linked below.

taxwaresystems.com/bank-products

TAXCOMM UPGRADED!

EXCITING ENHANCEMENTS ON TAXCOMM.COM!

We've upgraded TaxComm to make tax practice management easier and more powerful.

- ▶ **Streamlined Tax Return Presentation:** faster, more user-friendly tools.
- ▶ **Enhanced Scheduling & Booking:** share your booking calendar by email or your branded TaxComm page.
- ▶ **Customizable Client Portal:** personalized with your logo for a seamless, branded experience.
- ▶ **Seamless Billing & Payments:** send bills and accept secure credit card payments via Stripe.
- ▶ **Advanced Mobile App Functionality for Both the Tax Pro & the Tax Client:** Our enhanced mobile app now give tax pros and tax clients more functionality - manage documents, uploads, and e-signatures.

READY TO UPGRADE?

The upgraded version is live! Log in with your existing credentials at TaxComm.com - all your data transitions seamlessly.

STAY INFORMED: Watch feature videos anytime at TaxComm.com/Videos

Join us on the cutting edge of tax practice management with TaxComm's latest innovations!

INTERESTED IN SOFTWARE PURCHASE ASSISTANCE?

We've got great news! Now is the best time to grab Taxware Systems tax preparation software through SPA (Software Purchase Assistance) with all of our banking partners.

With SPA, you can get your program with no down payment and no interest. Loan approval dependent on previous bank product history. Rules vary per bank.

HOW DOES THE SPA PROGRAM WORK?

With the SPA program, the bank will pay for your tax software package so you don't have the headache of a payment plan and you pay **NOTHING** upfront.

Once the new tax season begins, the amount due to your chosen bank will simply be deducted from your tax preparation fees until paid in full. You will be charged nothing more than the price of your tax software.

CONTACT YOUR TAXWARE SYSTEMS' SALES REPRESENTATIVE TODAY TO LEARN HOW TO APPLY!

2025 TRADESHOW RECAP

With all the changes that the OBBBA has brought to our industry almost all IRS Tax Forums were sold out this year. It was great to visit with many of our loyal clients and spread the word about the Taxware Difference!

We look forward to attending more events in the future and thank you to everyone who took the time to visit our booth and share your insights!

Stay tuned for updates on where we'll be next, and we hope to see you soon.



IRS Tax Forums
San Diego, CA



Latino Tax Fest
Las Vegas, NV

TAXWARE SYSTEMS ANNUAL SEMINAR!

SAVE THE DATES!

November 12th & 13th, 2025 | 9AM PT - Partners Presenting
December 9th & 10th, 2025 | 9AM PT - Taxware Team Presenting

It's that time again! Circle the dates for Taxware Systems' Annual Seminar on your calendar. We are excited to connect with numerous members of our Taxware client family during this crucial time of year. This virtual format offers an excellent opportunity to ensure your entire office team receives valuable training. Please note that one registration per individual is necessary for accessing each Zoom session. We'll send out reminders, complete with session links, both on the day and an hour prior to each specific session.

Remember, you need to register for each session you intend to join. Be on the lookout for an email containing the Zoom link and session password for each event.

Mark those calendars because Taxware has plenty of exciting updates to share!

taxwaresystems.com/seminar



TECH TIPS

BACK-UP YOUR CLIENT DATA

Every year we get calls from clients about computer failures. If your computer fails and you do not have a back-up, there is little we can do for you. Getting a recovery made from failed hardware can be expensive and is not guaranteed to work.

Spend 5 minutes today to make a back-up that will save you hundreds of dollars and countless hours of data entry.

If you need help creating a back-up give technical support a call at 800.877.1065 and they will be happy to help!



Last Chance!

With most of the tax season stress behind you, we'd love to hear your feedback! If you've enjoyed working with us, please take a moment to leave us a Google review - it really helps us grow and continue serving you better.

All new Google reviews will be added into a drawing for an Amazon gift card! The winner will be announced at Taxware's Annual Seminar in December.

amazon.com
gift card





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Each referral will also enter you into a raffle at our annual webinar!

You can send us your referrals through our website at taxwaresystems.com/refer-a-friend or have them call us at **800.877.1065**. Make sure they tell us you sent them!

WAYS TO SHARE YOUR LOVE FOR TAXWARE SYSTEMS!

- ♥ Write a review on our Facebook page
- ♥ Send an email
- ♥ Phone-a-Friend
- ♥ Leave us a Google review

