TAXWARE TIMES

FALL 2019

SINCE 1979

HOLIDAY HOURS

Our office will be closed for the days listed below to celebrate the fall and winter holiday season.

THANKSGIVING
November 28th & 29th, 2019

CHRISTMAS
December 25th, 2019

NEW YEARS DAY
January 1st, 2020

WORDS FROM OUR FOUNDER

Thank you to everyone who has helped make this a wonderful celebration of our 40th Anniversary. Time really flies by! It only seems like yesterday that I programmed an HP41- calculator to do tax planning. When I began programming for my CPA practice, I never imagined the thrill I would have as we reached this significant milestone. You have entrusted us as partners in your successful tax practices, some for more than 30 years! We take on this role with great determination to provide you with the best income tax preparation software and service possible. I'm very proud of the work our programmers and staff accomplish. Even at 80 years old, I still love to do a few tax returns and love the program. Thank you so very much for your loyalty as our customers. We look forward to another 40 years to come!

King Dalton, CPA
FOUNDER OF TAXWARE SYSTEMS

HOLIDAY CELEBRATION IN THE SUMMER

Although holidays are busy times for everyone, they are especially challenging at Taxware because we are diligently preparing for the opening of tax season. Because of this we hold our official work holiday party in the summer months. With numerous baseball fans in the office we chose to attend the LA Dodgers' California League affiliate. Our very own Principal Developer "Dodger Dave" had the privilege of throwing the first pitch and we are proud to say it went right over home plate in the strike zone! A great time was had by all as we celebrated the successful completion of our 40th tax season.

UPDATES AND PROGRAM HIGHLIGHTS WEBINAR

Tuesday, December 3rd at 9AM PST

If you are unable to come to the Annual Seminar, you will not want to miss this webinar. The 2019 Tax year software updates and other highlights will be shared.

NEW CLIENT TRAINING WEBINAR

Wednesday, December 4th at 9AM PST

Although this webinar is specifically designed for new clients, new employees in your office will also benefit from the program.

ENTITIES 101 TRAINING WEBINAR

Thursday, December 5th at 9AM PST

This webinar will help you get the basic knowledge needed to utilize our Entity programs and also include an overview of the updates made for the 2019 tax year.

Space is limited for these webinars. Please email your registration to support@taxwaresystems.com.

INCLUDE:

▶ Name and Client ID

▶ Email address for each computer that will be logging in.

▶ Add the specific webinar title to the subject line.

We will then email you the access code required for entry to the webinar.

FOLLOW US ON

facebook
FB.COM/TAXWARESYSTEMS

▶ YouTube
TAXWARE SYSTEMS

Happy Holidays
& New Year Wishes!

TAXWARE TEAM

It was early 1987 when Taxware's Principal 1040 Developer Dave Hellman, then a recent graduate of CSUSB, made the great decision to join the Taxware Systems family. With no prior tax experience, it was the good people that he would get to work with and the fact that he didn't have to wear a tie that would confirm this decision.

"The Internet," was Dave's clear answer when asked what the biggest transition has been in the industry. "When I started, we had to wait for the IRS and states to mail us forms and instructions. Now it is all at your fingertips." On the programming side implementing the passive activity loss limitations in the late 80's and more recently the Affordable Care Act have provided unique challenges that Dave has been integral in conquering.

When he isn't in the depths of coding all the tax law changes, Dave enjoys seeing tribute bands in concert, improving his golf game, bicycling as well as showing support for the local high school football team by volunteering on the "chain crew."

With over 30 years as an integral leader at Taxware Systems, his favorite moment continues to be the feeling of accomplishment each year as he receives his final state approval for e-file.

You continue to amaze us -- Thank you Dave!

Dave Hellman
"Dodger Dave"

TECH TIPS
Advanced Client Information Screen Tips & Tricks

Do you know about the advanced client information screen? It is a tool already included in the program that has many frequently used features all in one place. It allows you to:

▸ Lookup a client's basic information without going into their return.

▸ Keeps all of the acknowledgments pertaining to that client in one place for easy reprinting including bank product if applicable.

▸ Maintains your client's payment and billing status with the ability to add a quick entry.

▸ Start an email or text to your client.

The best part of the advanced information screen is that it is available right from the recall client menu! To access the advanced information screen, go to your recall client list. From there single click on the client you are interested in. Press F2 on your keyboard or click on the [F2] button at the top of the client list and the advanced client information screen should appear.

Setting up your information to enable emailing from the program, is covered in our tutorial video available here: **https://youtu.be/bXt-7-3Mbjl**

Once you are finished reviewing your client, pressing 'Okay' will take you straight back to the recall client menu. The advanced client information screen is great for quickly looking up your client, making payments, and starting emails. Because you never leave the recall client screen, you are always just one click away from getting information about another client, starting a new return, recalling a prior return, or finishing up a return you have already started. Check it out today in your 1040 Individual Program!

Click here for the full text of the article.

-Matthew, Taxware Lead Technician

TAXWARE SYSTEMS ANNUAL SEMINAR

New Time! Monday, December 16th, 2019
Yes, this is a busy time of year. However, we believe that the sooner you know about changes in the tax laws and how they are incorporated into the Wintax NextGen program, the better prepared you will be for the new season. Our one-day agenda includes a continental breakfast and lunch.

We sincerely enjoy meeting our clients in person and certainly hope to see you there.

Registration will be completed on Eventbrite.
taxwaresystems.com/seminar

The seminar will be held at Azure Hotel and Suites. For hotel reservations be sure to mention you will be attending the Taxware Seminar for a special rate.

Monday, December 16th at 9AM - 5PM PST

Azure Hotel and Suites
Phone: 909.284.8670

1945 E. Holt Blvd.
Ontario, CA 91761

PROFORMA ORGANIZER

The Proforma Organizer has been updated for the 2019 tax season. It is available to download on our website at the provided link below. If you are currently registered through our website and we have your current e-mail address, you should have received an e-mail notification with a link to this newsletter. If you didn't receive an e-mail notification, please go to our website and register. This also enables you to use all of the additional support tools available to you on our website.

taxwaresystems.com/users/clientLandingPage.asp

Textellent INTEGRATION

We are always looking to provide information and technology that could benefit and improve the tax practices of our clients. In that effort, we have selected to partner with Textellent to provide cutting edge texting capabilities that will help our valued clients better communicate with their customers. We encourage you to watch the recorded webinar to learn more about Textellent and how we have integrated it into our software.

textellent.com/webinar/Taxware/

CELEBRATING 40 YEARS

Congratulations!

Four of our 40th Anniversary survey participants are gift card winners!

Brenda B. from West Virginia
Michael K. from New York

Karen L. from California
Jessica V. from California

Thank you to those who engaged with us online and who completed our survey. We've experienced 40 great years and we look forward to 40 more!

Brenda B. from West Virginia

We are thankful for you!

REFER-A-FRIEND LIMITED TIME OFFER

We are thankful for you! If you refer someone to us, and they sign up by Christmas, we will give you $150 (regularly $100) **off of your software.**

Ask your friends to call us today at 800-877-1065, so they can also -

EXPERIENCE THE TAXWARE DIFFERENCE