

TAXWARE TIMES

FALL 2026
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TAXWARE & THE TAXBOOK

SYSTEMS INC.

Taxware Systems is proud to partner with TheTaxBook, the nation's top-rated tax research provider. As a Taxware client, you can now purchase **WebLibrary Plus with TaxBert AI Tax Research Assistant** for just **\$329** (regularly \$429).

Powered by TheTaxBook's trusted tax content, including IRS code, publications, and court cases, TaxBert helps you find reliable answers fast. Simply ask questions in plain English to receive clear explanations with linked sources, save research chats, and even draft client letters and emails in seconds.

Better yet, **TaxBert is now integrated directly into Taxware software, including WinTax**, giving you one-click access to tax research right from your workspace.

Take advantage of this exclusive Taxware client offer at store.taxwaresystems.com.

Already a TheTaxBook subscriber? Contact us to receive Taxware pricing and ensure your TaxBert and WinTax accounts are fully connected



BANK ENROLLMENT NOW OPEN!

Now is the time to enroll with your preferred banking partner if you plan to offer bank products that allow clients to pay their tax preparation fees from their refund. Enrollment for all banking partners is fully integrated within your 2025 Wintax 1040 software, making the application process quick and convenient.



New Integration Announcement!

We're also pleased to announce that Taxware Systems is now an integrated partner with **Refundo**, giving our clients another innovative option for refund transfer and taxpayer funding solutions. Refundo offers refund transfer products that allow taxpayers to have preparation fees deducted directly from their refund, helping eliminate upfront out-of-pocket costs. Refundo also provides refund advance options for qualifying taxpayers, multiple refund disbursement methods, and a streamlined platform designed to help tax professionals improve client satisfaction and simplify fee collection. [refundo.com]

Instructions on how to complete your enrollment application can be found on our website at taxwaresystems.com/bank-enrollment-instructions. For details on all available bank products and programs for the upcoming season, visit taxwaresystems.com/bank-products.

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BANK ENROLLMENT NOW OPEN CONTINUED

NEED HELP PURCHASING YOUR SOFTWARE?

Don't forget about Software Purchase Assistance (SPA), available through our banking partners. Eligible preparers can obtain their Taxware Systems software with no down payment and no interest (approval and program rules vary by bank). Your software is paid for upfront by the bank, and repayment is automatically deducted from future tax preparation fees during the tax season. There are no additional charges beyond the cost of your software.

Contact your Taxware Systems Sales Representative today to learn more about bank enrollment, Refundo products, and SPA eligibility.

TAXWARE SYSTEMS ANNUAL SEMINAR

New January Dates!



SAVE THE DATES!

November 17th & 19th, 2026 | 9AM PT
Partners Presenting

January 12th & 13th, 2027 | 10AM PT
Taxware Team Presenting

We're excited to announce that our **Annual Taxware Systems Seminar**, presented by your Taxware Team, has been moved from December to **January** to help ensure more clients are fully installed, checked in, and ready to hit the ground running for the new tax season. By moving these sessions closer to the start of filing season, you'll receive the most relevant training and updates at the time you need them most.

This virtual seminar is a great opportunity for your entire office to prepare for a successful season. To attend, **each participant must register individually for every session they plan to join**. Zoom links and session passwords will be emailed to registered attendees, with reminder emails sent both one hour before and on the day of each session.

Mark your calendars and stay tuned for registration details. We have exciting new features, important updates, and valuable information to share as we kick off another successful tax season together.

Learn more and register at:
taxwaresystems.com/seminar

IMPORTANT INFORMATION UPDATED TAXWARE SOFTWARE LICENSE AGREEMENT

As a company that has proudly supported tax professionals for more than 45 years, we value the relationships we have built and want to make sure you have the information needed to continue using Taxware with confidence. As part of our ongoing commitment to keeping our software, policies, and client resources current, we have updated the Taxware Software License Agreement.

The updated agreement is effective immediately and can be reviewed here:
taxwaresystems.com/bulletins/license_agreement.pdf

You can also always access the Software License Agreement directly within your Taxware programs by selecting the **Misc. Features** tab from the Home Screen.

While this updated agreement does not change the overall intent of the original license you may be familiar with, it provides additional clarity and includes updated language needed for today's software environment.

We would also like to highlight one important point regarding licensing. The Taxware software license has always been intended for use by **one business at one location**. With the growth of remote work and changing business structures, some practices may have unintentionally moved into a situation where software access is being shared among multiple tax professionals who operate separate businesses or locations.

If your current setup may fall into this category, please reach out to our team. We are happy to help you review your licensing needs and make sure your practice is properly set up before the upcoming tax season. This will help avoid any unnecessary interruptions or frustrations.

We appreciate your continued trust in Taxware Systems and look forward to supporting your success in the coming season and beyond.



Meet Taxbert

THE FRIENDLY AI RESEARCH ASSISTANT

POWERED BY
THE TAX BOOK

October 29th, 2026 at 11AM PT

The Perfect Tool That All Tax Professionals Need To Make it Through the Season with Ease and Speed. Plus Taxware Exclusive discounts!

Join us to find out what is new, learn how it works, and why you will never want to be without it!

REGISTER HERE: bit.ly/4hZBPik

NEW IRS REQUIREMENT FOR ELECTRONIC 1099 FILING FIRE SYSTEM RETIRED

If you electronically file 1099s or other information returns, the IRS now requires a new IRIS Transmitter Control Code (TCC). The FIRE platform is to be retired on November 18, 2026.

To continue filing electronically for the 2027 filing season, apply for your IRIS TCC through your IRS e-Services account as soon as possible. The IRS advises that processing can take up to 45 days, although many applications are approved more quickly.

Once you receive your IRIS TCC, please email your TCC Application Summary to Taxware Systems at taxwareteam@taxwaresystems.com so we can ensure your account is properly prepared for electronic filing.

Don't wait until filing season. Applying early will help avoid delays and ensure you're ready to electronically file your 2026 tax year information returns.

Please see our blog post below for links to complete instructions and the application:

taxwaresystems.com/new-iris-tcc-required-for-electronic-filing-of-information-returns

IMPORTANT UPDATE FOR OUR CALIFORNIA CUSTOMERS

We would like to inform our California customers of an upcoming change in California sales tax law that may affect your annual software license renewal invoices.

Under **California Senate Bill 122 (SB 122)**, sales and use tax will apply to prewritten software delivered electronically, including downloaded software, effective **January 1, 2027**. Previously, many electronically delivered software products were not subject to California sales tax.

As a result, any renewal subscription invoices paid, adjusted, or issued on or after **January 1, 2027** will include applicable California sales tax.

WHAT THIS MEANS FOR YOU:

- ▶ If your 2026 renewal invoice remains unpaid as of **December 31, 2026**, your renewal amount will be adjusted to include applicable California sales tax before processing.
- ▶ Beginning in **2027**, sales tax will be applied to renewal subscription and additional program purchase invoices in accordance with California law.
- ▶ To avoid these additional costs on your current renewal, we encourage you to submit payment before **December 31, 2026**.

This provides an opportunity to realize some savings before the new tax requirements take effect.

Thank you for your continued business.

★ ★ ★ *Leave Us A Review!*

Were you happy with your experience this tax season? We'd greatly appreciate a **Google review!**

Your review helps us grow, reach more tax professionals, and continue improving the products and support you rely on. As an added bonus, all new **Google reviews will be entered into a drawing for an Amazon gift card.**



The winner will be announced at **Taxware's Annual Seminar in January.**

Thank you for your support and for helping others learn about Taxware Systems through your review!



2026 Tradeshow Recap!

It is always a pleasure to get out and meet with clients and future customers at events like Latino Tax Fest in Las Vegas and the IRS Tax Forums in New Orleans, San Diego, Florida and Chicago. We truly enjoy hearing about your passion for the tax industry and hearing how we as a software developer are key to your ability to provide quality service to your clients each year.

We look forward to seeing you again next year!





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FOR EACH REFERRAL THAT
DEMOS WITH OUR TEAM.

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&
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\$100 OFF

YOUR SOFTWARE RENEWAL
WITH THEIR PURCHASE.

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

