TAXWARE TIMES

WINTER 2022

SINCE 1979

NEWSLETTER INDEX

HOLIDAY HOURS

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

CHRISTMAS
December 26th, 2022

NEW YEARS
January 2nd, 2023

Happy Holidays
from Taxware Systems

Warmest greetings to our valued clients!

Thank you for being the most important part of who we are.

May your holidays be filled with peace and joy this season and may 2023 bring health and prosperity to you and your families.

Our sincere best wishes from Your Taxware Team.

TAXWARE SYSTEMS PARTNERS WITH PROTECTION PLUS

Join thousands of tax professionals who are spending more time growing their business and less time handling tax notices. This year we are partnering with Protection Plus to give you and your clients the option to receive protection from IRS and state audits. Protection Plus provides:

$1 Million Tax Audit Defense™
We'll provide up to $1,000,000 of services to resolve any tax notice associated with a taxpayer's 1040 return.*
*Subject to terms and conditions.

Identity Theft Restoration
We'll provide up to $1,000,000 of services to resolve any tax notice associated with a taxpayer's 1040 return.*

$2,500 Tax Preparation Guarantee
If an error is made in preparing a taxpayer's 1040 return, we'll provide reimbursement for additional fees, penalties, and interest up to $2,500.*
*Subject to terms and conditions.

Enhance Your Tax Services for Only $10 Per Return

TAXWARE   ProtectionPlus
                 Think Beyond The Return

REGISTER FOR THE LIVE WEBINAR HERE: bit.ly/3iKa0iQ

TAXWARE SYSTEMS ANNUAL TAX WEBINAR FOR THE 2022 TAX YEAR

JOIN US!
TAXWARE SYSTEMS ANNUAL TAX WEBINAR

REGISTER TODAY!
DECEMBER 13TH & 14TH, 2022

TAXWARESYSTEMS.COM/SEMINAR

HOSTED ON
zoom

It's that time of year again! Mark your calendars for the Taxware Systems' Annual Webinar. We are thrilled to be able to reach and communicate with so many members of our Taxware family of clients at such a critical time of year. This format is a great way to have all your office staff trained as well. One registration per person will be required to view each session on Zoom. Reminders will be sent with the links the day as well as the hour before each specific session.

Remember to register for each session for the days you plan to attend. This ensures that you receive an email with the Zoom link and password for each session.

Mark your calendars! Taxware has many great things to share.

There will be lots of giveaways! Each session will have 1 drawing. Winners will be notified by email and prizes will be sent by mail.

GIVEAWAYS – THANK YOU TO OUR PRIZE SPONSORS!

TAXCOMM   Textellent   THE TAX BOOK *Real Answers. Real Fast!*   ProtectionPlus *Think Beyond The Return*

eps   Refund Advantage *Powered by Pathward*   TPG *Santa Barbara*

BANK ENROLLMENT REMINDER!

Don't Forget! 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.

taxwaresystems.com/bank-enrollment-instructions

Although it is still unknown when the official tax season will begin, Pre-Tax Season advances provided by the banks are usually available for your customers as early as January 2nd.

Want to learn more about this option?
Visit our webpage that explains the bank integrations provided through Wintax 1040.

taxwaresystems.com/bank-products

We Moved!

Our new office address is:
**195 N Euclid Ave., Suite 201
Upland, CA 91786**

TECH TIPS

Watch for Current Live Trainings! Go to **taxwaresystems.com/current-live-trainings** for important, up-to-date topics. We will guide you through the Taxware program, inform you about bank product offerings and details, and provide you with answers to questions on topics of your choice.

Now is the time to refresh your knowledge and skills in preparation for the upcoming tax season. Our tech team is hard at work creating and updating online tutorials in both English and Spanish.

Click on the links below:

ENGLISH

taxwaresystems.com/videos

ESPAÑOL

taxwaresystems.com/videos/#spanish-tutorials

FOLLOW US ON

facebook
FB.COM/TAXWARESYSTEMS

YouTube
TAXWARE SYSTEMS

TAXCOMM

THE COMPLETE CLIENT COMMUNICATION TOOL

Developed with the Tax Professional in mind.

AT THE OFFICE, AT HOME, EVERYWHERE YOU WANT TO BE

TaxComm is wherever you are and allows you to communicate with your clients effectively, regardless of where in the world you may be.

TaxComm's secure, web-based program combines the things you love from Zoom™, Messenger™, DocuSign™, & Dropbox™ types of programs, into one easy to use dashboard.

ALL OF YOUR TOOLS IN ONE PLACE
DESIGNED BY TAX PROFESSIONALS *FOR TAX PROFESSIONALS*

SECURE FILE REQUESTS

SECURE MESSAGES

E-SIGNATURE

VIDEO MEETINGS

Including a Taxpayer synced **mobile application** for picture and document upload as well as document signature!

TRY TAXCOMM FOR FREE TODAY!

PROFORMA ORGANIZER

Download the updated Proforma Organizer today!

It is available on our website by clicking on the link below. Are you registered on our website? If so, and if we have your current email address, you already received an email notification from us with a link to this newsletter. Registering through the website gives you access to all available support tools

taxwaresystems.com/users/clientLandingPage.asp

THETAXBOOK
Real Answers. Real Fast!

As a client of Taxware Systems you are entitled to receive 10-25% off all TheTaxBook products and free shipping year-round! When ordering, be sure to use Taxware's Promo Code to ensure you receive the negotiated discount.

Order at: thetaxbook.com/TaxwareSystems
Taxware Promo Code: 785

Learn more using the link below about the *5 Free Services* included with every order.

taxwaresystems.com/thetaxbook

PROGRAM RELEASE

The initial release of our 2022 Tax Year software will be available for download mid December through the **Client Login Portal** located on our website.

An announcement of the exact date will be made via email and within the messages of your programs.

taxwaresystems.com/users/clientLandingPage.asp

TAXWARE TEAM OUT & ABOUT

Just a few pictures from our Taxware Team Appreciation Events. We went on a lot of fun adventures this year! From whale watching, kayaking, bowling, to battling in Squid Games through virtual reality! We can't wait to see what we get up too next year!

TAXWARE SYSTEMS
REFER-A-FRIEND PROGRAM

$25 OFF
YOUR SOFTWARE RENEWAL FOR EACH REFERRAL THAT DEMOS WITH OUR TEAM.

&

$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

TAXWARE TENDER
REFER-A-FRIEND

CONGRATULATIONS, DODGER DAVE!

It is with mixed emotions that we announce the retirement of programmer David Hellman. He has provided us with 35 years of devoted service, talent, and friendship. We don't know how we will get along without him!

Dave's attention to detail, while keeping the broader picture in mind, has been invaluable. His willingness to put in extra time and effort to help us meet deadlines has demonstrated a commitment to excellence that we have come to depend on. In addition to his incredible skill, he has been a friend to all with his thoughtfulness and quiet encouragement. We are excited for him to move on to the next chapter of his life, spending time with his grandchild and keeping up with the LA Dodgers at Dodgers' Stadium.

Dave, as an avid golfer, loved his retirement party at Top Golf! We celebrated, reminisced, and created memories that will last a lifetime.
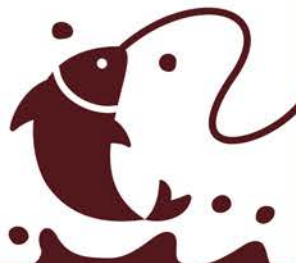
TAXWARE TEAM SPOTLIGHT

Accounting and Professional Tax Preparation run thick in the family line of Mike Nielson. Following in the footsteps and advice of his father, Mike became a licensed tax professional through Consumer Affairs, well before CTEC was created. Little did he know he would take this journey deeper as he joined Taxware Systems in early 1986 as computerized tax preparation was just beginning to launch into mainstream popularity.

In 1987 Taxware would join the ground floor of the pilot program for processing tax returns electronically, now known as e-file. Mike was instrumental in our implementation of this historic project. Today he is Taxware's Lead E-File Developer. Mike says, "The best thing about Taxware is the work environment and the people". He joined our team over 35 years ago and continues to help consult on and develop our software products for tax professionals across the country.

When he is not at work, Mike spends time at many of his favorite fishing spots, including the Pacific Ocean, rivers, lakes, and streams in California, Idaho, and Utah. (His specialty is fly fishing.) You may also find Mike kiteboarding and rock climbing. Mike and his wife, Leah, married for more than 30 years, enjoy spending quality time with their five grown children. Keeping his family's tax legacy alive, their son Dane works for an accounting firm and specializes in taxes.

Mike Nielson
Tax Pro, Programmer & Fisherman