



TOM CRUISE?! JK!



IRS TAX FORUM
SAN DIEGO, CA



Fun Memories!



Old Friends!



New Partners!

ANNOUNCING OUR EXCITING NEW PARTNERSHIP & INTEGRATION WITH REPUBLIC BANK TAX REFUND SOLUTIONS

Taxware Systems, a leading provider of innovative income tax preparation software solutions, is thrilled to announce its strategic partnership and seamless integration with Republic Bank Tax Refund Solutions. This collaboration marks a significant milestone, combining Taxware's cutting-edge software with Republic Bank's expertise in tax refund solutions.

The integration allows tax professionals and businesses to streamline their tax processing, offering a comprehensive solution for tax preparation, filing, and refund disbursement. With Taxware Systems' state-of-the-art software and Republic Bank Tax Refund Solutions' robust platform, users can expect enhanced accuracy, efficiency, and security in managing tax refund disbursements through Refund Transfers¹.

"We are excited to partner with Republic Bank Tax Refund Solutions to bring our clients a quality option for ensuring that tax preparation fees are paid in a timely and efficient way," said Catherine Dalton, Director of Sales and Marketing at Taxware Systems. "This integration reflects our dedication to providing the best tools tax professionals need to run their businesses."

Key benefits of using a Refund Transfer through Taxware and Republic Bank include faster access to refunds for many taxpayers, reduced administrative burdens for tax professionals, and improved overall tax-filing experiences. Republic Bank is happy to partner with Taxware and look forward to establishing a strong partnership in delivering the highest level of service and reliability to their clients.

For more information about Taxware Systems and Republic Bank Tax Refund Solutions, please visit: taxwaresystems.com/bank-products

Republic Bank Tax Refund Solutions is a trusted leader in the e-file industry. With a focus on security, accuracy, and speed, they provide financial institutions and tax professionals with reliable tools for processing tax refunds in a fair and responsible manner.

To learn more about what products Republic has to offer please visit: republicrefund.com

¹A Refund Transfer is a fee-based product offered by Republic Bank & Trust Company, Member FDIC. A Refund Transfer Fee and all other authorized amounts will be deducted from the taxpayer's tax refund.





TAXWARE SYSTEMS ANNUAL WEBINAR

December 12th & 13th
at 9AM & 11AM PT

and more!



WE WANT TO HEAR FROM YOU!

What features do you want to dive deeper into learning about Taxware's Suite of programs? We are constantly seeking feedback to determine what webinars or additional tutorial videos would be helpful to our clients. Do you have a topic you really want your Taxware Team to educate more about?

Send your ideas today to
TaxwareTeam@taxwaresystems.com



TECH TIPS

Don't forget!

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!

TAXWARE SYSTEMS ANNUAL SEMINAR NOW WEBINAR!

SAVE THE DATES!

December 12th & 13th, 2023 | 9AM & 11AM PT

It's that time once more! Circle the dates for Taxware Systems' Annual Webinar 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

2023 TRADESHOW RECAP

What an incredible summer it has been for our team as we embarked on a whirlwind tour of tradeshow across the United States! After a challenging four-year hiatus from in-person events, we were thrilled to hit the road and reconnect with our clients and industry peers.

Our travels took us to Latino Tax Fest in Las Vegas, NATP Taxposium in San Antonio Texas, and 2 of the IRS Nationwide Tax Forums in San Diego and Orlando. The energy at the tradeshow was fantastic, and we had the chance to network with industry leaders, showcase our latest solutions, and gain valuable insights.

Overall, this summer has been a wonderful journey, and we are grateful for the opportunity to be back at in-person events, strengthening our bonds with colleagues and partners. Here's to many more exciting adventures in the future!

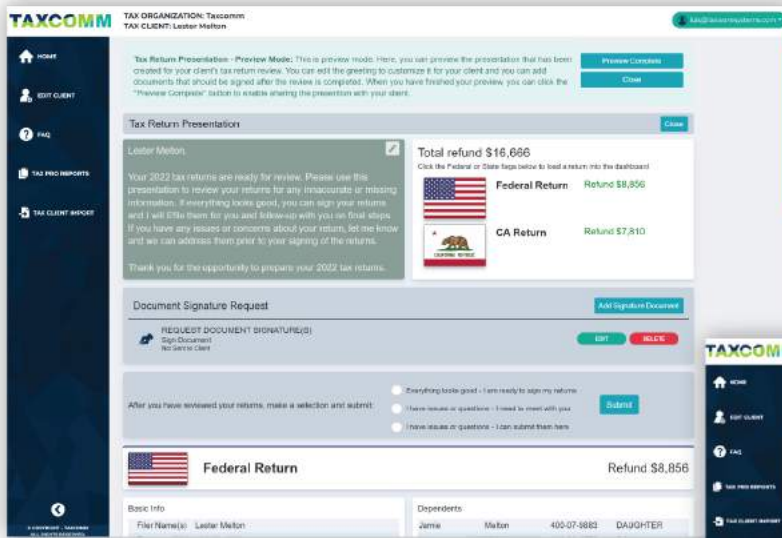


YOU DON'T WANT TO MISS TAXCOMM PRESENTATION MODE

One of the most difficult challenges as a tax professional can be helping your tax client understand the key components of the tax return. The IRS 1040 forms just don't help.

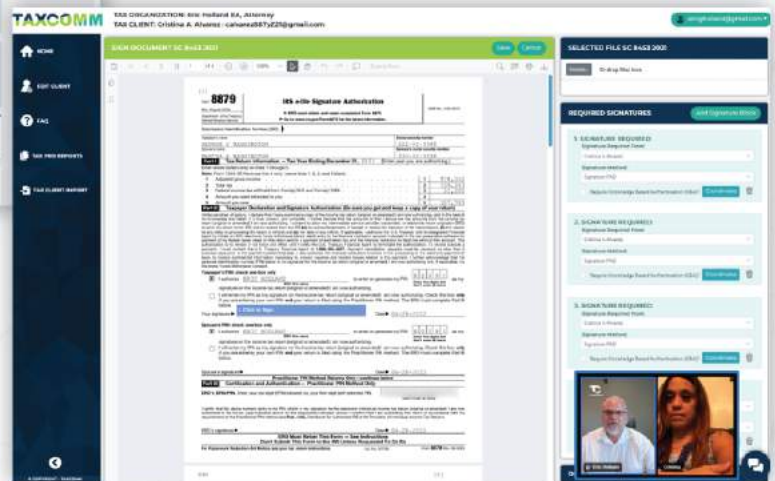
With TaxComm.net's Presentation Mode you will be able to present your client's return in a visually appealing way. They not only will instantly understand what their tax liability is and whether a refund is due to them, but also, they will be able to compare that to the prior years tax return as well. Graphics have been specifically designed to make this feature as appealing and effective as possible. This feature can even be made into an action item, so the client is able to view the presentation and sign off on the tax return at the same time.

As a Wintax customer the integration with this tool is as easy as it can be.



FULL DASHBOARD ACCESS DURING PRESENTATIONS AND VIDEO MEETINGS

Have access to all the tools you need during a presentation with your client. You can even send and receive documents while telecommunicating.



REVIEW AND SIGN SIGNATURE DOCUMENTS "FACE-TO-FACE"

Clients can sign their documents with KBA tools right through their browser or the TaxComm Mobile App. Give your clients that in-person assurance in the age of remote consultation.

PROTECTION PLUS PARTNERSHIP CONTINUES STRONG

We are thrilled to continue into our second year of our partnership with Protection Plus. The services they provide have been sought after by many of our clients and can be a benefit in handling the workload that may come with tax audits and more. Be sure to attend their webinar during our Annual Seminar in December, or visit their website:



new.taxprotectionplus.com

- ▶ **Tax Audit / Inquiry Assistance**
With a simple phone call, you will receive the assistance you need with Federal and State Returns.
- ▶ **Identity Theft Restoration**
24/7, 365 Access to Identity Theft Restoration Advocates who will provide comprehensive, personalized recovery services.
- ▶ **IRS Identity Theft Assistance**
If you experience problems in filing your tax return due to a suspected identity theft incident, we will interact with the IRS on your behalf.
- ▶ **\$2,500 Preparer Error Guarantee**
If a legitimate preparer error is made during the filing of a return, you can be reimbursed up to the first \$2,500.*
- ▶ **Tax Credit / ITIN Assistance**
We assist you with Denied Credits and Rejected ITINs.

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TAXWARE SYSTEMS

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

