EXPERIENCE THE
TAXWARE
DIFFERENCE
SINCE 1979

TAXWARE
SYSTEMS INC.

PROFESSIONAL TAX & ACCOUNTING SOFTWARE

CONTENTS

"I would like to take this opportunity to express my appreciation for all that you did for us this tax season. I can't imagine completing a successful season without all the help and support you provided to our office. We really appreciate the time you took in answering all our concerns."

– Mario G.
Brownsville, Texas

THE TAXWARE DIFFERENCE

▶ WE ARE SOFTWARE DEVELOPERS

Taxware Systems is led by an expert development team, combining a lifetime of preparation and programming concepts to provide the tools for tax and accounting professionals. Celebrating 40 years in the industry, Taxware has always responded to the needs of our customers with many of the features included in our software programs because of our clients' suggestions.

▶ LIVE TECHNICAL SUPPORT YEAR-ROUND

We answer our phone! All programs come with free, unlimited, year-round technical support from technicians located in Southern California. With extended support hours during your busiest time, our excellent support staff can help you get started quickly and will be there when you need them most.

▶ FAST MOUSE-FREE DATA ENTRY

Data entry through Taxware is fast and easy. Taxware's goal over the years has been to develop a system of data entry that is quick and simple enough to use so that information can be entered by the preparer at the time of the interview. Our input is designed with the tax preparer in mind. Taxware clients have the option to use the 10-key pad to select only the items that apply to each tax return eliminating unnecessary key strokes and mouse clicks.

SPEED & PERFORMANCE

▶ CONSTANT CALCULATIONS DONE INSTANTLY

There is no need to worry about forgetting to "recalculate" each time you make a change to a client's return. Summary totals are available at the left of most screens and updated instantly as you enter the data. There is no guessing what the status of a client's refund might be while inputting their information.

▶ ZERO HIDDEN FEES & ZERO BANK TECHNOLOGY FEES

Gain peace of mind knowing that at Taxware Systems we value integrity. We will never charge extra hidden or Bank Technology Fees to use the software. We have a "No Surprise" fee structure with competitive pricing for our clients regardless of whether they require bank integration and additional support for bank products.

▶ LIVE PREVIEW

With the click of a button, you and your client can see the tax return develop on the official tax forms. We then take this one step further with our new "Live Preview" feature. With this great tool, not only can you preview any form or schedule, but now all the forms or schedules will update and instantly calculate as you navigate through the tax return.

Made in
California

▶ AMERICAN MADE

From development to our outstanding customer service, Taxware Systems is proud to be 100% American owned and operated, with our headquarters located in Southern California.

WINTAX NEXTGEN 1040

All of our programs are available as Windows-based desktop applications. Taxware's Individual Tax program provides virtually all the forms and schedules you will need to prepare even the most complex tax return. Our state tax programs are included at no additional cost and do not require additional downloads or unlock codes.

Wintax NextGen 1040 Income Tax program is set to become the most powerful in the industry!

- ▶ **Enhanced Windows 10 Look**
- ▶ **Menu Scaling**
- ▶ **Live Preview**
- ▶ **"Bread Crumb" Navigation**
- ▶ **Easy Networking**
- ▶ **Enhanced E-File Validation**
- ▶ **Increased Security**
- ▶ **Fast Mouse-Free Data Entry**
- ▶ **Unlimited E-File with No Hidden Fees**
- ▶ **And Much More!**

WINTAX NEXTGEN 1040

All forms update instantly as information is entered into the program. A great way to take advantage of this feature is by using a second monitor facing your client. This allows them to watch the return fill in as you input the information on the monitor facing you.

LINE INPUT SCREEN WITH LIVE PREVIEW

WINTAX NEXTGEN 1040

▶ COLOR CODED E-FILE TRACKER

Taxware Systems' e-file tracker is second to none. Throughout the entire electronic filing process you will always have the most up-to-date status of your returns. Our e-file tracker also allows you to reprint acknowledgments and see a history of transmissions. A variety of intuitive filters are provided to make searching for the information you need, quick and efficient.

E-FILE TRACKER SCREEN

WINTAX NEXTGEN 1040

▶ TAX PLANNING

We integrate the tax planning module into our individual program and it is available **NOW**. No additional program updates are required.

We want you to be able to help your clients plan for the future, today.

▶ TAX REPORTS

We provide as many tools as possible to help your office be efficient and productive. Wintax offers a wide range of reports to analyze anything from office productivity to client information.

▶ CUSTOM BILLING & INVOICES

Our billing section is powerful and flexible. Multiple titled billing profiles may be setup to accommodate the variety of tax returns and rate schedules you may need.

TAX PLANNING MODULE
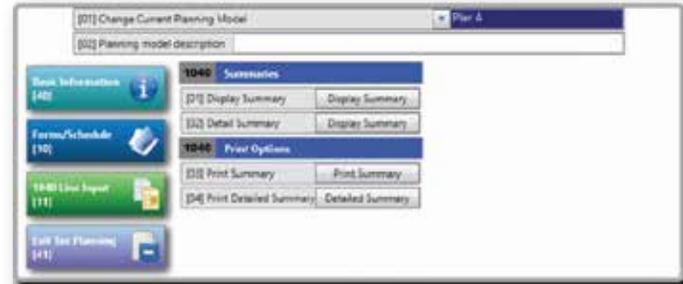
BILLING SECTION
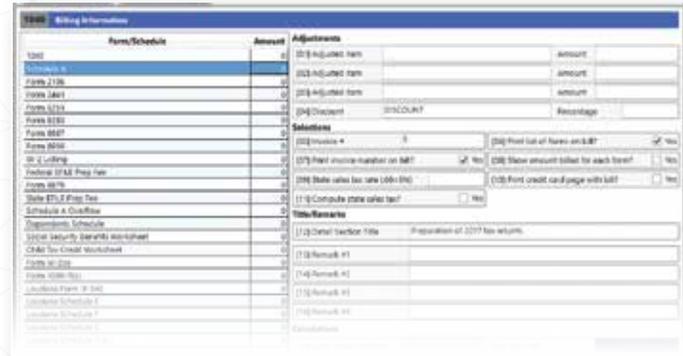
BUSINESS PROGRAMS

▶ S CORPORATION | CORPORATION | PARTNERSHIP | FIDUCIARY

The entity programs feature a wide range of forms and supported states are included at no additional cost. Our business forms are comprehensive, easy to follow and simple to use. Income, deduction, expense, and distribution items are uncomplicated to navigate, input and they calculate automatically. Batch allocation of Schedule K and distribution amounts are flexible and automatic. We produce an impressive plain language Schedule K1 page 2 income tax carry form for your partners, shareholders, and beneficiaries.

PARTNERSHIP MAIN MENU

SAM STARLING LLP

Forms/Schedules Used

1065
Client Billing
Schedule L
Schedule M1/M2
Schedule D
Form 4562
Form 4797
Form 8825
Schedule K
Schedule K1(s)
Misc Schedules

Total Income
323,470,613

Total Deductions
242,784,710

Taxable Income
80,685,903

Balance Sheet Status
Balanced

Number of Partners
3

States Used

[01] Basic Information	Basic Information
[02] Questions and Additional Information	Questions
[03] Gross Income Categories	Income
[04] Deduction Categories	Deductions
[05] Schedule K and K1 input	Sch K and K1 input
[06] Schedules M1 and M2	Schedule M1/M2
[07] Balance Sheet (Schedule L)	Schedule L
[08] Miscellaneous Scheduling	Misc. Sched.
[09] Application for automatic extension (Form 7004)	Form 7004
[10] Reconciliation for Corp's with assets over $10 Million	Schedule M-3
[11] Print Forms	Print
	Billing
CA	State Proc.

SCHEDULE L INPUT SCREEN

SCHEDULE K INPUT SCREEN

"Thanks to you and your programmers for the marvelous support which your company provides. Your prompt responses and the immediate help which is offered by your programmers is very much appreciated.

I feel very early into this tax season that I made the right choice going with Taxware."

- Ron S.
Seattle, Washington

ACCOUNTING PROGRAMS

Taxware Systems offers a complete line of payroll and accounting programs including: Payroll Checkwrite, After the Fact Payroll, General Ledger/Client Writeup, 1099 Accumulator and Money Manager.

Our programs provide you with more than just tools to print checks and forms. Taxware's payroll and accounting programs are flexible and can be customized to meet the needs of any business.

▶ WINPAY

Winpay is a payroll check writing program that you can use to easily calculate and print payroll checks. It can be used for your firm's payroll or to process payroll for your clients. W2 electronic filing is included through the SSA internet upload system.

▶ GENERAL LEDGER/CLIENT WRITEUP

This extremely fast, double entry, journalizing system has been designed with ease of use, and data entry speed as its paramount features. Income statements, balance sheets, trial balance, and various other detailed reports are automatic.

▶ MONEY MANAGER

Money manager is a simple, single entry bookkeeping system that will sort transactions into business, personal rental, and personal income tax related items.
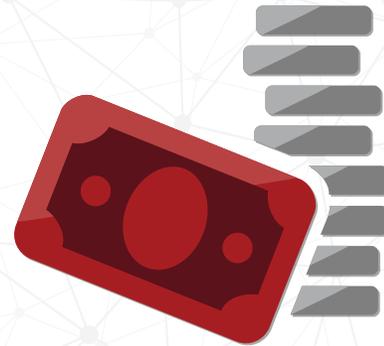
WINPAY MAIN MENU
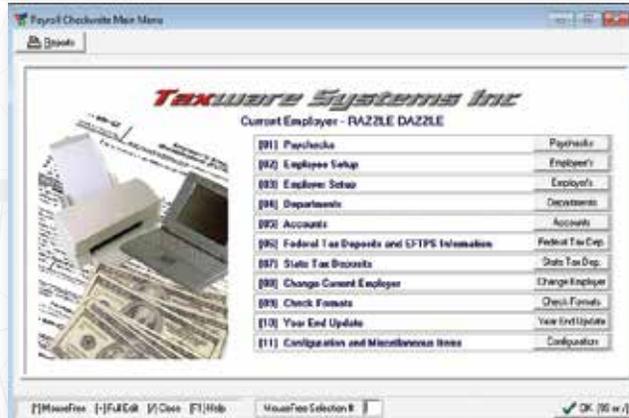
WINPAY PAYCHECK JOURNAL
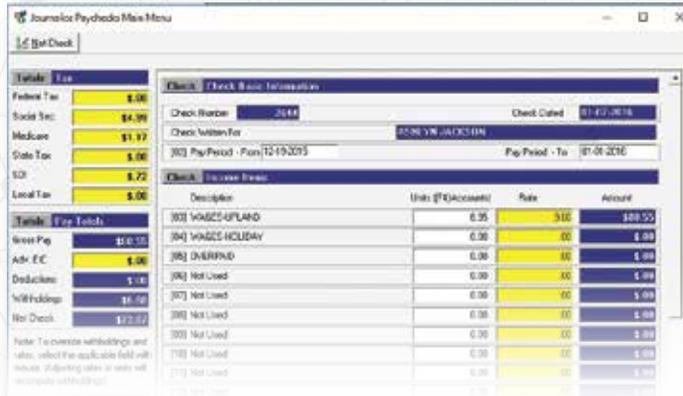
"I want to say your staff is tops and second to none. They are patient, competent and helpful regardless how complicated or how simple the issue is. I don't think customer service of this kind combined with competence is found very often. Thanks to all of you for helping us make it through another tax season."

– David G.
Fairfield, Connecticut

ADDITIONAL SOLUTIONS

▶ BANK PRODUCT INTEGRATION

The ability to provide a variety of options for payment of your preparation fees, as well as provide other financial products your clients may be interested in, is important to many tax professionals. Many look to bank products to provide that flexibility. Taxware provides integration with Refund Advantage, TPG-Tax Products Group and EPS to give our clients a variety of options in both product and services to grow their business. Taxware does **NOT** charge any hidden fees that are typical in the industry including Technology/Document Fees etc.

▶ ELECTRONIC SIGNATURE

Save time and eliminate the need to scan signature documents! Compatible with e-signature solutions available from third-party providers as well as complete integration with the Topaz Signature pads, you are ready to digitally sign PDFs. Whichever business process you choose there is an e-sign option that will work for you.

▶ W-2 SCANNER

Starting a tax return has never been faster or easier than with the ability to scan your client's W-2 with a 2D barcode scanner within the Wintax program. The information captured is automatically placed into your client's tax return speeding up the interview process and improving efficiency. A PDF417 compatible scanner must be purchased to enable this feature for W-2's that include the proper barcode specifications.

Textellent

The ability to text your clients and automate the scheduling of appointments may be important to help you grow your business and save time and payroll in the process. To provide these solutions Taxware has united with Textellent, creating a seamless integration with their marketing and calendaring products. Proven automated campaigns to help you acquire new clients, remind and engage with current clients as well as boost your ability to promote your referral program, are just a few of the many benefits of the Textellent program. Taxware Systems is the only software that provides a 100% integration, streamlining your efficiency when you use these dynamic programs.

Learn more at **Textellent.com/webinar/Taxware**

▶ DOCUMENT MANAGEMENT

Taxware's PDFDocArk program is an excellent solution for file management and makes going paperless easy! It allows you to add documents to existing tax return PDF files and browse already created documents. This program has the ability to import Word, Excel, pictures, and various other documents directly into your client's file.

▶ 1099 ACCUMULATOR

1099 Accumulator is used to quickly enter transactions that will go to 1099 Miscellaneous and 1099 INT forms. Detailed reports can be viewed or printed in either non-employee transactions or summary totals for each employee. Electronic filing is available through the IRS FIRE Production Program.

"I have been with Taxware Systems, almost since its inception. I believe I have been with them since 1982 or 1981. Anyway, I love the program. I have tried other programs out there; however, I find that I have extreme flexibility with Taxware to prepare taxes the way I wish to prepare taxes. I appreciate Taxware's knowledgeable staff and love that my feedback is heard and implemented on a dime. Their support is great and more often than not, if I call in, I almost immediately speak with a technician. Not only that, but I can ask for the same technician every time."

– Clay B.
Oceanside, California

SOFTWARE TRAINING

▶ VIDEO TUTORIALS

We have a great tutorials section on our website that provides a fantastic resource for answering many of the questions you might have about our tax and accounting programs.

Additional tutorials will be added in the future, so be on the lookout for them!

▶ DETAILED TRAINING WEBINARS

We encourage everyone, especially new clients, to attend our live annual seminar. We understand that travel can be difficult so if you cannot attend, additional live and pre-recorded webinars are available. In these webinars we will cover basic setup and tax return flow and preparation. We conduct a question and answer session at the end of the each training webinar.

Contact us to find out when our next webinar is scheduled.
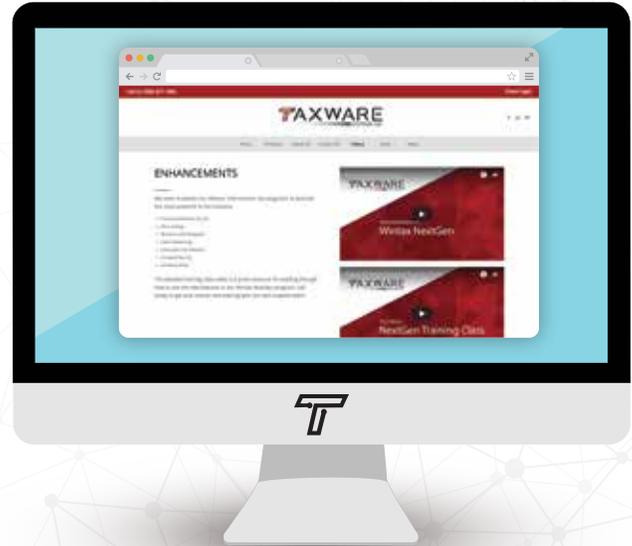
▶ LIVE ANNUAL SEMINAR

Taxware conducts a live annual seminar here in Southern California. During the seminar, we go over the program for the new tax year, including the new features and major tax law changes. We will walk you through the flow of a return from start to finish, and answer any questions you have along the way. We will also send you home with a printed manual containing all of the information we covered during the seminar.

Our clients are more than a number to us. We look forward to this opportunity to meet face to face.

"We are thankful for your technical support staff. They are always patient, pleasant, timely, and very helpful in resolving program issues over the past years of our association.

Again, we thank you and appreciate your efforts and hope that you will have a great year."

- Derrick M.
Glen Burnie, Maryland

TAXWARE SYSTEMS HISTORY

In 1979 our President and Founder, King Dalton, CPA, began his venture into computerized tax processing. At this time a "minicomputer" was the size of a large desk, cost around $25,000, required constant maintenance and was completely obsolete in less than a few years.

The early years of computers and tax preparation software were a time of discovery and constant change as hardware continued to develop and improve in many ways including both convenience of size as well as processing speed. The development of laser printers combined with a more unified programming language was a large step forward in the tax preparation world and Taxware Systems was there to lead the way.

In an effort to cut down on the amount of paper mailed and housed by the IRS, in 1986 they initiated a very select and limited pilot project with the intent to electronically transmit tax returns via modem. Once again Taxware was on the ground floor led by our Vice President, successfully entering the modern age of E-file.

Income tax and tax prep software have continued to advance as laws, and technology evolve at a rapid pace. Taxware continues to put the needs of our clients as paramount as we continue to make SPEED, SERVICE, and SECURITY our top priorities. We are here for you, and consistently prove this, as we personally answer our phone and your questions to provide a level of customer service that hearkens back to 40 years ago when it all began.

Designed and utilized by tax and accounting professionals, Taxware Systems provides a quality product for our clients. From pre-Microsoft DOS operating systems through to today's current Microsoft Windows platforms, we provide a lifetime of programming experience. Combined with our expertise of preparing tax returns and bookkeeping, we know we have created outstanding programs that professionals can trust.

King Dalton, CPA
FOUNDER OF TAXWARE SYSTEMS

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