

EXPERIENCE THE  
**TAXWARE**  
DIFFERENCE  
SINCE 1979

**TAXWARE**  
SYSTEMS INC.

PROFESSIONAL TAX & ACCOUNTING SOFTWARE



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"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

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## ► 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. With over 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.

## ► NO DIY SOFTWARE TO STEAL YOUR CLIENTS!

We choose to be **LOYAL** to tax professionals and will not offer a competing online do-it-yourself program that could steal your customers.

## ► LIVE, FAST TECHNICAL SUPPORT

We answer our phone! All programs come with free, unlimited, year-round technical support from technicians located in the United States. 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.

## ► ZERO CHARGES TO EFILE AND AFFORDABLE PACKAGES TO BUY ONLY WHAT YOU NEED.



## ► 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.

## ► E-SIGNATURE COMPATIBLE

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.

## ► 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 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 1040 Income Tax program is set to become the most powerful in the industry!

- ▶ **Enhanced Windows 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**





## ► LIVE PREVIEW

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

File Preview

File

[30439]

**1040**

U.S. Individual Income Tax Return

**20XX**

OMB No. 1545-0047

All other forms must be filed by the due date of this return.

**Filing Status:** ☐ Single ☐ Married joint return ☐ Married filing separately (OMB 1545-0048) ☐ Head of household (OMB 1545-0049) ☐ Qualifying surviving

Check only one

and last.

If you checked the MFS box, enter the name of your spouse. If you checked the HQT or QSS box, enter the estate's name. If you checked the joint return box, enter the name of the first spouse.

Your first name and middle initial

Last name

Your total account number

SSN: 5-8-8-5

5-8-8-5

10309

103091234

Print your name, address, and taxable year

Last name

Print your total account number

Home address (include rural and mailbox info): Home phone (P.O. box, no institution):

WP No.

Printed name (last, first, middle)

**1234 Address Way**

State

ZIP code

Check here if you, or your spouse, are a dependent.

City or town

State

ZIP code

Check here if you, or your spouse, are a dependent.

Employer country name

State

ZIP code

Check here if you, or your spouse, are a dependent.

Employer country name

State

ZIP code

Check here if you, or your spouse, are a dependent.

Employer country name

State

ZIP code

Check here if you, or your spouse, are a dependent.

Employer country name

State

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Employer country name

State

ZIP code

Check here if you, or your spouse, are a dependent.

Employer country name

State

ZIP code

Check here if you, or your spouse, are a dependent.

Employer country name

State

ZIP code

Check here if you, or your spouse, are a dependent.

Employer country name

State

ZIP code

Check here if you, or your spouse, are a dependent.

Employer country name

State

ZIP code

Check here if you, or your spouse, are a dependent.

Employer country name

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ZIP code

Check here if you, or your spouse, are a dependent.

Employer country name

State

ZIP code

Check here if you, or your spouse, are a dependent.

Employer country name

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ZIP code

Check here if you, or your spouse, are a dependent.

Employer country name

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ZIP code

Check here if you, or your spouse, are a dependent.

Employer country name

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Employer country name

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ZIP code

Check here if you, or your spouse, are a dependent.

Employer country name

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Check here if you, or your spouse, are a dependent.

Employer country name

State

ZIP code

Check here if you, or your spouse, are a dependent.

Employer country name

State

ZIP code

Check here if you, or your spouse, are a dependent.

Employer country name

State

ZIP code

Check here if you, or your spouse, are a dependent.

Employer country name

State

ZIP code

Check here if you, or your spouse, are a dependent.

Employer country name

**Wintax Individual Tax**

Support

1040 Line Input

Print
Preview
Forms & Schedules
View Prior
TWPDF Archive
ELF Tracker [FBI]
Forms Search

[51] Basic Info
☐ Hide Basic Info

Depreciation	<b>Forms/Schedules Used</b>	
[5K] Due Diligence	Form 1040 U.S. Individual Income Tax Return Schedule A Itemized Deductions Schedule E Supplemental Income Form 7940 Power of Attorney Schedule B Capital Gains and Dividends Form 8879 Paid Preparer's Declaration Form 9999 Additional Materials Form 9802 Director of Internal Revenue Listing Standard Deduction Worksheet Schedule C Supporting Statements Taxable Income Earned Income Credit Worksheet Tax Credits Total Tax Total Payments Refund	
20,000		
AGI		
20,000		
27,770		
12,500		
0		
0		
0		
0		
0		
\$1,133		
\$1,133		

Prior Forms/Schedules

### 1040 U.S. Individual Income Tax Return 20XX

Department of the Treasury - Internal Revenue Service

File Instructions: ☒ Single ☐ Married filing jointly ☐ Married filing separately (MFS) ☐ Head of household (HOH) ☐ Qualifying widow(er)

If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QW box, enter the child's name.

Your first name and middle initial: \_\_\_\_\_ Last name: \_\_\_\_\_  
If joint return, spouse's first name and middle initial: \_\_\_\_\_ Last name: \_\_\_\_\_

Home address (number and street). If you have a P.O. box, see instructions.  
**1234 Address Way**  
City, town, or post office. If you have a foreign address, also complete sections below.

State ZIP code  
CA 91010

COUNTRY Foreign province/state/country Foreign postal code

At any time during 2022, did you: (a) receive (as a reward, bounty, or compensation); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.) ☐

**Standard Deduction** Someone can claim: ☐ You as a dependent ☐ Your spouse as a dependent ☐ Spouse claims on a separate return or you were a dual-status alien

**Age/Inherits Year:** ☐ Were born before January 2, 1964 ☐ Are blind ☐ Spouse: ☐ Was born before January 2, 1964

**Dependents** See instructions: (A) First name Last name (B) Social security number (C) Relationship to you (D) Check one if it applies:  
☐ Child tax credit ☒ Other dependent  
☐ More than four dependents, see instructions and check none ☐

**Income** (01) Total amount from Form(s) W-2, box 1 (see instructions)  
(41) Household employee wages not reported on Form(s) W-2  
(42) Tax income not reported on line 1a (see instructions)

# WINTAX 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 Individual Tax**

Support

Get Ack's | Rebuild | Print

**Client Search**

Taxpayer SSN

Taxpayer Last Name

Taxpayer Full Name

Client ID

Return Date

Transmission Date

Acknowledgment Date

**E-File Status Filter**

ALL

Client ID	Taxpayer SSN	Name(s)	Gov Code	Status	Return Date	Trans Date	Ack Date
1	400-00-4901	BROWN, CHARLIE W	FED	Accepted	11-09-2022		11-09-2022
1	400-00-4901	BROWN, CHARLIE W	NC	Accepted	11-09-2022		11-09-2022
11	400-00-4913	PIG, PORK E	FED	Accepted	11-09-2022		11-09-2022
13	400-00-4914	GREENE, JOHN A	FED	Accepted	11-09-2022		11-09-2022
2	400-00-4902	COYOTE, WYLIE E	FED	Accepted	11-09-2022		11-09-2022
3	400-00-4903	PIG, PORK E	FED	Accepted	12-12-2022		12-12-2022
3	400-00-4903	PIG, PORK E	NC	Accepted	12-23-2022		12-23-2022
4	400-00-4904	MOUSE, MICKEY C & MINNIE P	FED	Rejected	12-08-2022		12-08-2022
5	400-00-4905	DUCK, DAFFY C & DAISY M	FED	On Extension	12-09-2022		12-09-2022
5	400-00-4905	DUCK, DAFFY C & DAISY M	NC	Accepted	12-23-2022		12-23-2022
6	400-00-4906	KENT, CLARK T & LOIS L	FED	Accepted	11-09-2022		11-09-2022
7	400-00-4907	SIMPSON, HOMER J & MARGE J	FED	On Extension	11-09-2022		11-09-2022
7	400-00-4907	SIMPSON, HOMER J & MARGE J	NC	Awaiting Acknowledgement	11-09-2022		11-09-2022
8	400-00-4908	KING, NALA P	FED	Accepted	12-08-2022		12-08-2022
8	400-00-4908	KING, NALA P	NC	Accepted	12-23-2022		12-23-2022
9	400-00-4909	FUDD, ELMER D	FED	Accepted	11-09-2022		11-09-2022
1	400-00-7031	QUICK, TEST	VA	Accepted	01-10-2019		11-19-2022
10	400-00-7040	QUICK, TEST	VA	Accepted	02-12-2015		11-28-2022
11	400-00-7041	BERGER, ROBERT J & WIFE W	FED	Accepted	11-18-2022		11-18-2022
11	400-00-7041	BERGER, ROBERT J & WIFE W	VA	Accepted	11-28-2022		11-28-2022
12	400-00-7042	OLMSTEAD, WALTER T & KERI	FED	Accepted	11-28-2022		11-28-2022
12	400-00-7042	OLMSTEAD, WALTER T & KERI	VA	Accepted	11-29-2022		11-30-2022
2	400-00-7032	TEST, JOHN & KRISTINA	FED	Accepted	11-28-2022		11-28-2022

**Expanded Information**

Client ID: 6

Taxpayer First: CLARK

Taxpayer Last: KENT

Taxpayer SSN: 400-00-4906

Gov Code: FED

Status: Accepted

Preparation Date: 11-09-2022

Transmission Date: 11-09-2022

Ack Date: 11-09-2022

Accepted Date: 11-09-2022

Rejected Date:

Submission ID: 00000120225556111000

Refund: 0

Balance: 6923

Print 9325: Print 9325

Reprint Ack: Reprint Ack

Show History: A2A History



# WINTAX 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

[01] Change Current Planning Model Plan A

[02] Planning model description

**1040 Summaries**

[03] Display Summary Display Summary

[04] Detail Summary Display Summary

**1040 Print Options**

[05] Print Summary Print Summary

[06] Print Detailed Summary Detailed Summary

[07] Form Print Form Print

### BILLING SECTION

**1040 Billing Information**

You may alter any billed amounts for this return by changing the value in the 'Amount' column. These changes will not reflect on the default bill, only this return.

Form/Schedule	Amount
Form 1040 - U.S. Individual Income Tax Return	150.00
Schedule 1 - Additional Income and Adjustments	0.00
Schedule 2 - Additional Taxes	0.00
Form 1040V - Payment Voucher	85.00
Schedule C - Profit or Loss from Business	95.00
Schedule D - Capital Gains and Losses	97.00
Schedule SE - Self Employment Tax	25.00
Schedule 8812 - Credit for Qualifying Children and Other Dependent Care Expenses	85.00
Form 8867 - Paid Preparer's Due Diligence Checklist	0.00
W-2 Listing	50.00
Federal EFILE Prep Fee	39.00
Form 8879 - E-file Signature Authorization	0.00
State EFILE Prep Fee	0.00
Bank Application Preparation Fee	0.00
Schedule 8812 Worksheet(s)	0.00
Qualified Business Income Deduction Simplified Worksheet	0.00
Form W-2(s)	50.00
Virginia 760CG - 763, 760PY - Individual Income Tax Return	0.00
Virginia Schedule AD/ICG - 763 AD1, 760PY AD1	0.00
Virginia Schedule CR/ICG - Credits	0.00
Virginia Schedule INC/ICG - VA Withholding from W-2s, 1099s	0.00

**Adjustments**

[01] Adjusted item Maintenance IT Fee Amount 5.00

[02] Adjusted item loyal client discount Amount -50.00

[03] Adjusted item Amount

[04] Discount DISCOUNT Percentage

**Selections**

[05] Invoice # 7 [09] State sales tax rate (.08-.0%)

[06] Print list of forms on bill ☒ Yes [10] Compute state sales tax? ☐ No

[07] Print invoice number on bill? ☒ Yes [11] Print credit card page with bill? ☐ No

[08] Show amount billed for each form? ☒ Yes

**Remarks**

[12] Detail Section Title

[13] Remark #1

[14] Remark #2

[15] Remark #3

[16] Remark #4

Calculations

# BUSINESS PROGRAMS

## ► S CORPORATION | CORPORATION | PARTNERSHIP | FIDUCIARY

The entity programs feature a wide range of forms and supported states that 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

**PRISTINE OATS CEREAL LLC**

<b>Forms/Schedules Used</b>	
1065	
Client Billing	
Schedule L	
Form 8825	
Form 7004	
Schedule K	
Schedule K1(s)	
<b>States Used</b>	

Total Income	450,000
Total Deductions	52,141
Taxable Income	397,859
Balance Sheet Status	Balanced
Number of Partners	3

[01] Basic Information	Basic Information
[02] Questions and Additional Information	Questions
[03] Gross Income Categories	Income
[04] Deduction, Tax, and Payment 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 Ptnr.

## SCHEDULE L INPUT SCREEN

Preview Print

Beginning of tax year column (ON/OFF) ☐ Yes

**Sch L Assets**

	Beginning of tax year		End of tax year	
	Column(a)	Column(b)	Column(c)	Column(d)
[01] Cash				
[02] Trade notes and accounts receivable				
[04] Less allowance for bad debts				
[06] Inventories				
[07] US government obligations				
[08] Tax-exempt securities				
[09] Other current assets				
[10] Loans to partners				
[11] Mortgage and real estate loans				
[12] Other investments				
[13] Buildings and other depreciable assets			408,994	
[15] Less accumulated depreciation			14,232	394,762
[17] Depreciable assets				

## SCHEDULE K INPUT SCREEN

Preview Print

**Sch K Partners' Shares of Income, Credits, Deductions, etc**

[001] Ordinary income(loss) from trade or business activities (pg. 1, line 22)	397,859
[002] Net income(loss) from rental real estate activities (Form 8825)	-26,977
[003] Gross income from other rental activities	
[004] Expenses from other rental activities (Statement)	
[005] Guaranteed payments: Services	
[006] Guaranteed payments: Capital	
[007] Do Not Batch Allocate Guaranteed Payments	<input checked="" type="checkbox"/> Yes
[008] Interest income	
[009] Ordinary dividends	
[010] Qualified dividends	
[011] Dividend equivalents	
[012] Royalties	
[013] Net short-term capital gain(loss)	
[014] Net long-term capital gain(loss)	
[015] Collectibles (28% gain or loss)	

Income (Loss)

"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: Winpay-Payroll Checkwrite, 1099 Accumulator, and General Ledger/Client Writeup.

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.

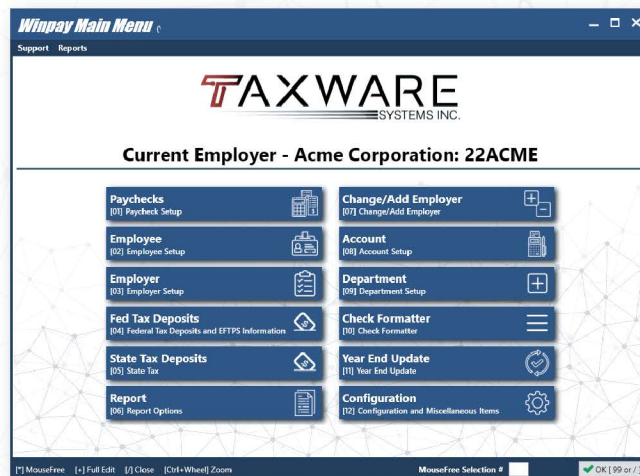
## ► WINPAY

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. Federal 94X reports included - many with e-file support.

## ► 1099 ACCUMULATOR

Quickly enter transactions to produce 1099-NEC, 1099-MISC, and 1099-INT forms. The program supports printing the federal and various state, local, and file copy forms. Federal copies can be printed on the IRS-required red preprinted form, or transmitted using the IRS F.I.R.E. or MEF systems. Detailed reports that include transactions or summary totals can be viewed or printed.

WINPAY MAIN MENU



## WINPAY PAYCHECK JOURNAL

Net Check		Check Basic Information	
<b>Totals</b>	<b>Tax</b>	[01] Check Number	Check Dated
Federal Tax	\$21.89	[02] Check Written For	John Smith
Social Sec.	\$45.88	[03] Pay Period - From	01-01-2022
Medicare	\$10.73	Pay Period - To	01-15-2022
State Tax	\$23.80	[04] Pay State	CA
SDI	\$8.14		
Local Tax			
<b>Totals</b>	<b>Pay Totals</b>		
Gross Pay	\$760.00		
Adv. EIC			
Deductions	\$20.00		
Withholdings	\$110.24		
Net Check	\$629.76		
Hours	40.00		

Check Income Items				
Description	Units (F4)-Accounts	Rate	Amount	
[05] Wages	40.00	19.00	\$760.00	
[06] Salary				
[07] Bonus				
[08] Not Used				
[09] Not Used				
[10] Not Used				
[11] Not Used				
[12] Not Used				
[13] Not Used				
[14] Not Used				

Check Deduction Items				
Description	Units	Rate	Amount	

## 1099 ACCUMULATOR MAIN MENU

Support

TAXWARE

SYSTEMS INC.

Current Employer - Bob's Hot Dogs

Client Info

[01] Client Information

Employee

[02] Employee / 1099 Recipient Information

Transactions

[03] Enter and/or Edit Transactions

Change Client

[04] Change Current Client

Configuration

[05] Configuration

Reports

[06] Print Reports

Year-End-Update

[07] Year End Update

"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



TaxComm is wherever you are and allows you to communicate with your clients effectively, regardless of where in the world you may be. TaxComm seamlessly integrates with Wintax 1040 and is developed with the tax professional in mind.

TaxComm's secure, web-based program combines the things you love from multiple communication programs all rolled into one. E-signature, document transfer, video meetings, secure messaging, and more are included with one unified tool to ease the work of the tax pro during the heat of the season and all year round.

## ► 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 EPS, Refund Advantage, Republic Bank, and TPG-Tax Products Group 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.





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.

## ► 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.

"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

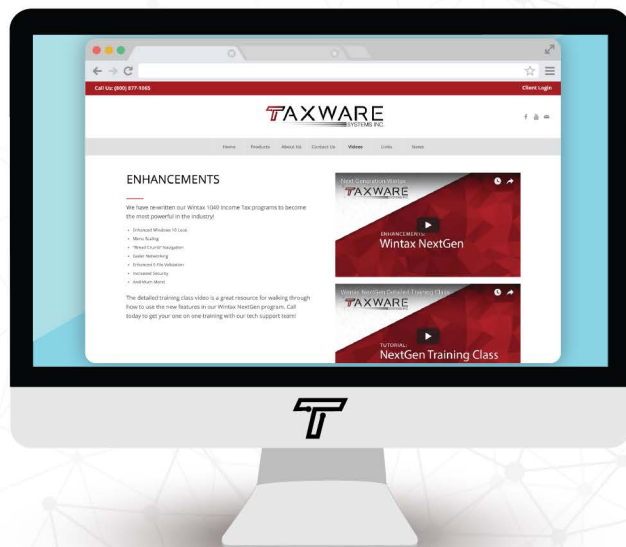
We have a great tutorials section on our website that provides a fantastic resource for answering many of the questions you might have about our tax and accounting programs.

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 annual seminar. Additional live and pre-recorded webinars are available. In these webinars we will cover basic setup, tax return flow, and preparation.

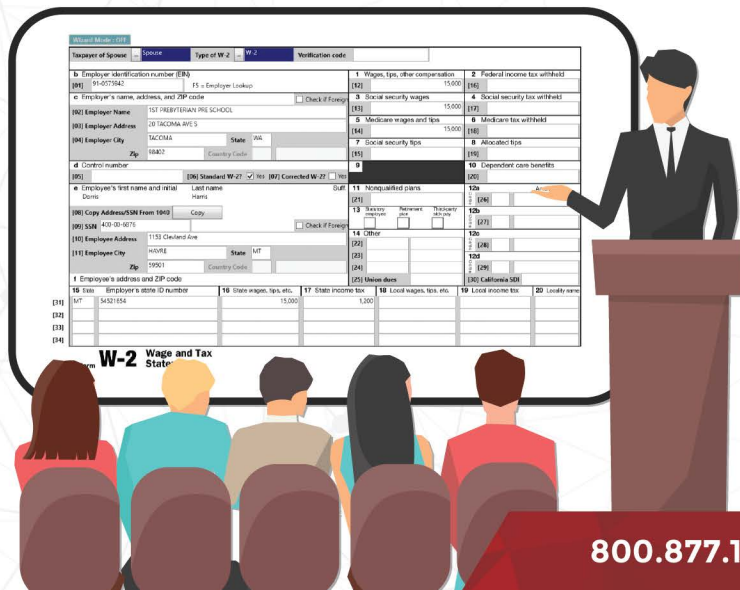
Contact us to find out when our next webinar is scheduled.



## ► ANNUAL SEMINAR

Taxware conducts an annual seminar just before the start of the tax season. During the seminar, we go over the programs 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. This is a great time for your whole office to learn, get updated, and ready for the season no matter where they are working from.

Our clients are more than a number to us. We look forward to this opportunity to give you a head start towards a smooth tax season.



"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 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 harkens 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



**Scott Dalton, EA**  
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