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

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!

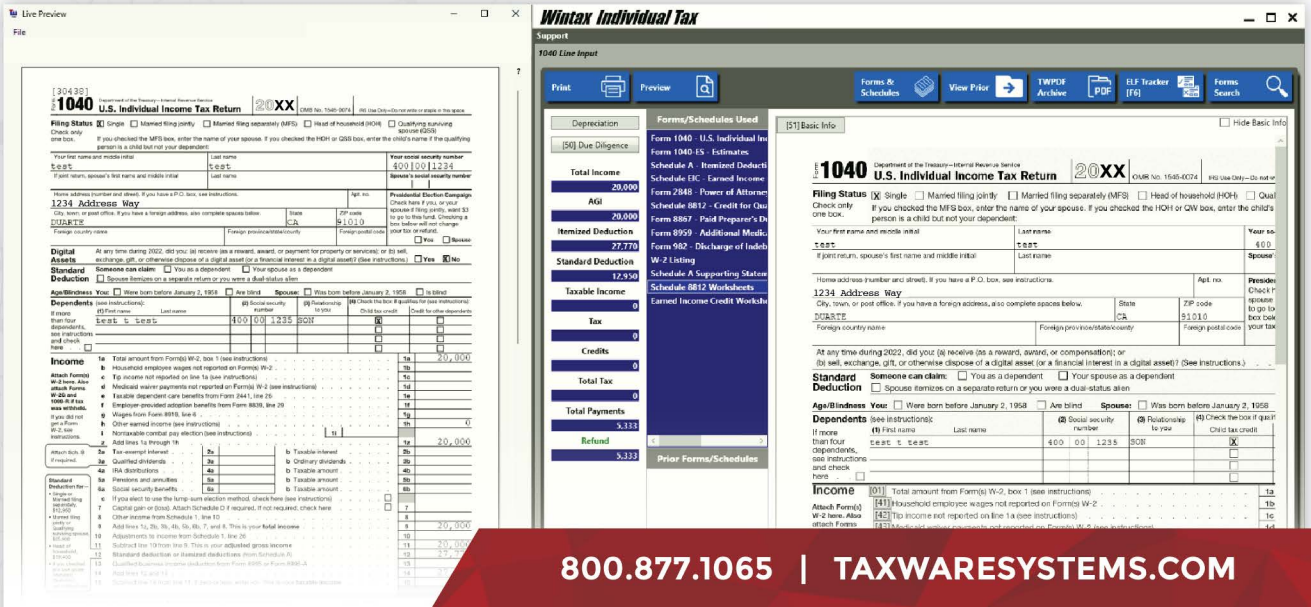
- **Enhanced Windows Look**
- **Menu Scaling**
- **Live Preview**
- **"Bread Crumb" Navigation**
- **Easy Networking**
- **Enhanced E-File Validation**
- **Increased Security**
- **Fast Mouse-Free Data Entry**
- **Unlimited E-File with No Hidden Fees**

WINTAX 1040

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

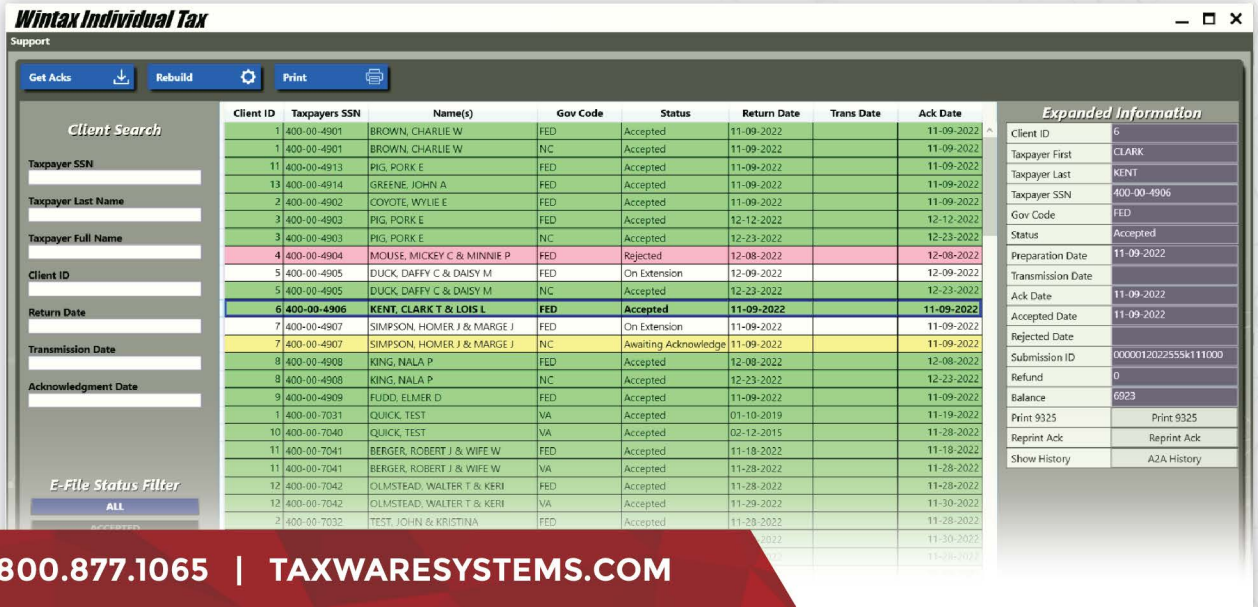


WINTAX 1040

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 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.

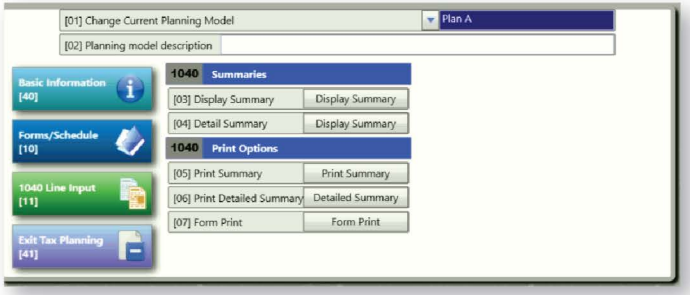
TAX REPORTS

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.

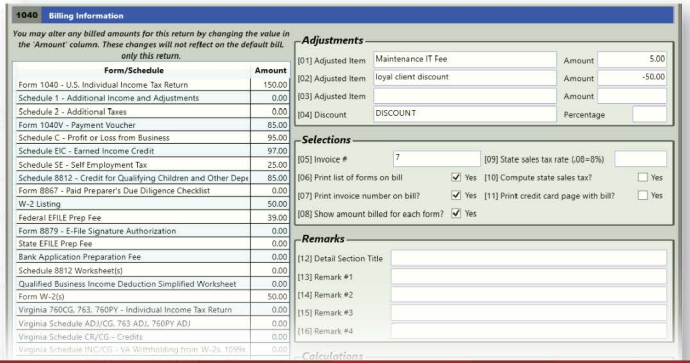
CUSTOM BILLING & INVOICES

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

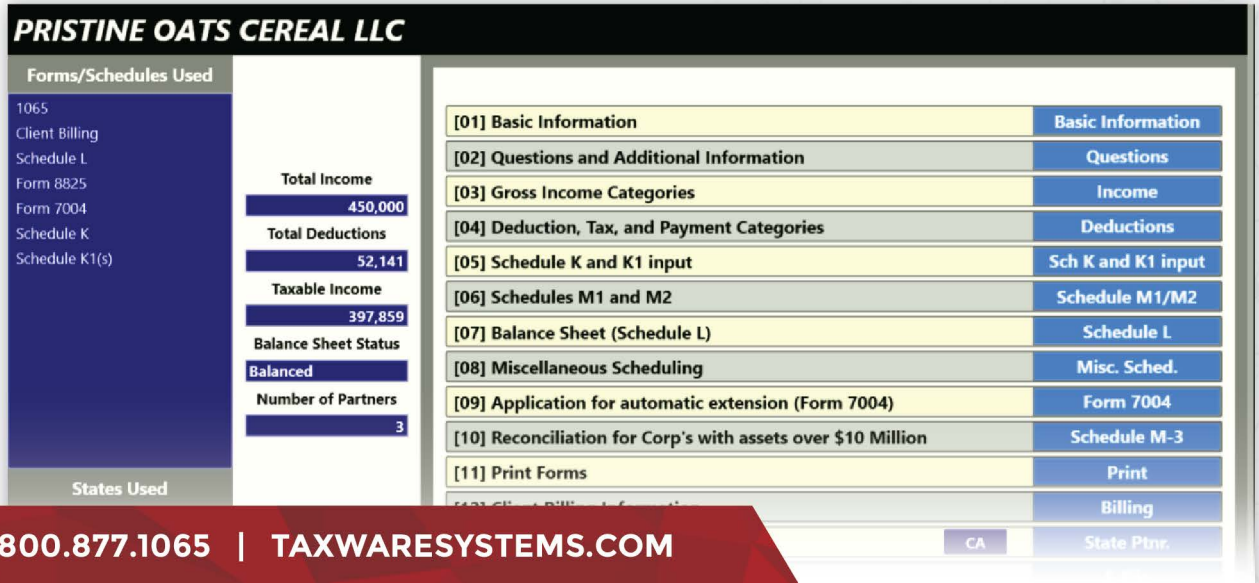


BUSINESS PROGRAMS

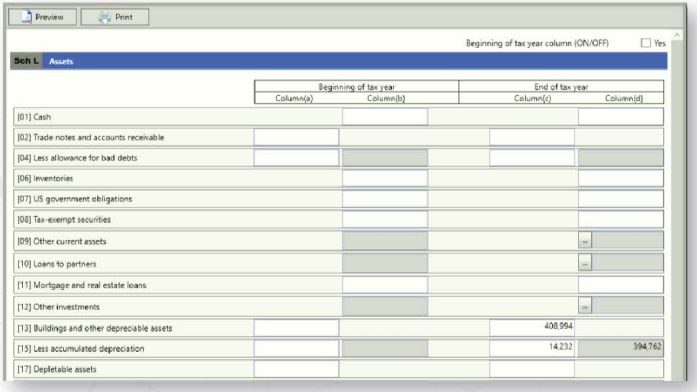
S CORPORATION | CORPORATION | PARTNERSHIP | FIDUCIARY

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

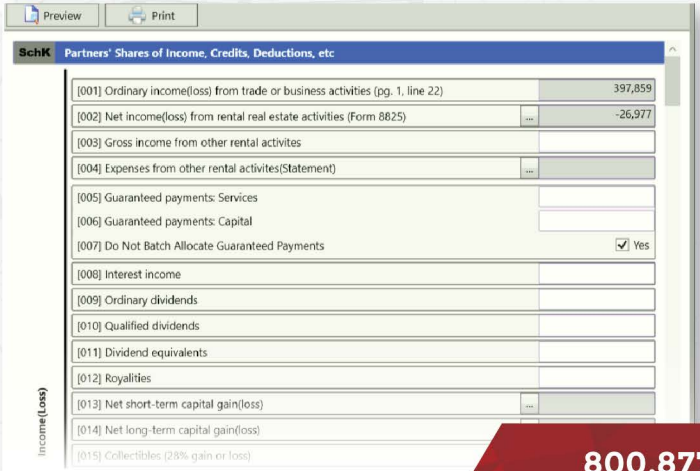
PARTNERSHIP MAIN MENU



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: 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.

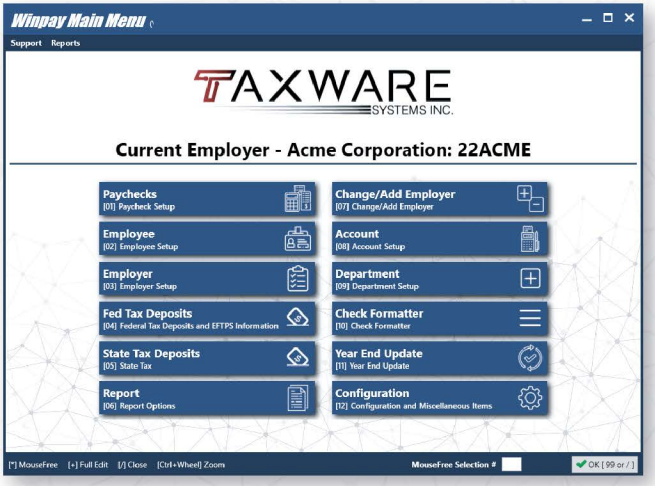
WINPAY

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

1099 ACCUMULATOR MAIN MENU

"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

THE COMPLETE CLIENT COMMUNICATION TOOL

SIGN UP FOR YOUR FREE TRIAL TODAY AT TAXCOMM.NET!

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.

eps powered by Pathward

Refund Advantage Powered by Pathward

REPUBLIC BANK & Trust Company Tax Refund Solutions republicrefund.com

TPG Santa Barbara

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.

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

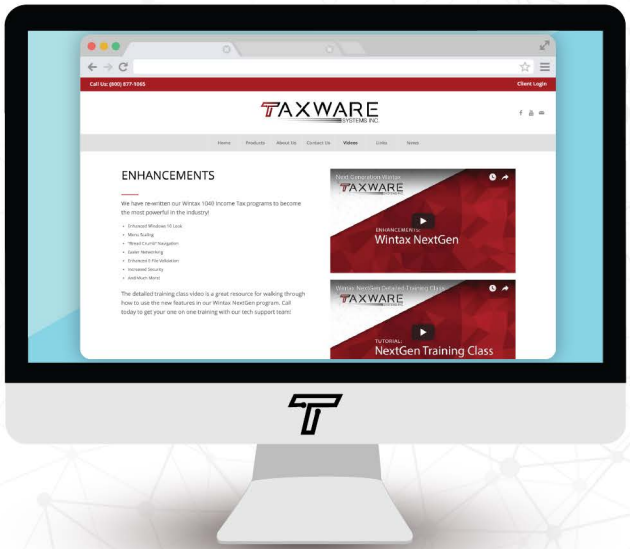
We have a great tutorials section on our website that provides a fantastic resource for answering many of the questions you might have about our tax and accounting programs.

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.

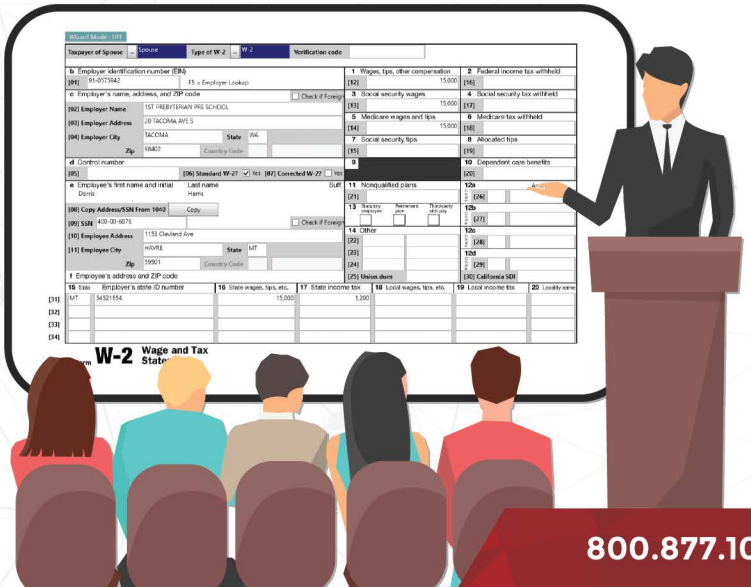
Contact us to find out when our next webinar is scheduled.



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 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.

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