

# TAXWARE TIMES

WINTER 2020  
SINCE 1979

*Happy Holidays*  
from Taxware Systems

## TAXCOMM

TaxComm - The Complete Client Communication Tool will be available very soon.  
We know you will love it!

### ALL OF YOUR TOOLS IN ONE PLACE

DESIGNED BY TAX PROFESSIONALS FOR TAX PROFESSIONALS



#### SECURE FILE REQUESTS

Securely request and receive **all documents needed** to complete the tax return.



#### E-SIGNATURE

Receive **electronic signatures** requested with no pay-per-signature charges.



#### VIDEO MEETINGS

Keep client relationships strong through video meetings. **Face to face** communication is important in the tax industry.



#### SECURE MESSAGES

**Secure messaging** with standard or potentially privileged tax advice.



Includes a Taxpayer-synced **mobile application** for picture and document upload as well as document signature!\*

\*CURRENTLY AWAITING MOBILE APP APPROVAL.



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

Communicate effectively with your clients regardless of where in the world you may be. Expand the reach of your practice beyond your local area and grow your business. TaxComm is the tool you need!

**\$29.99**  
PER MONTH/USER

OR



**\$300** PER YEAR  
PREPAY ANNUALLY

**FREE TRIALS AVAILABLE SOON  
AT TAXCOMM.NET!**



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## HOLIDAY HOURS

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

**CHRISTMAS**  
December 25<sup>th</sup>, 2020

**NEW YEARS DAY**  
January 1<sup>st</sup>, 2021

# JOIN US!

TAXWARE SYSTEMS ANNUAL ~~SEMINAR~~  
Webinar

REGISTER TODAY!

DECEMBER 15TH, 16TH, 17TH, 2020

REGISTER TODAY!



## TAXWARE SYSTEMS ANNUAL TAX WEBINAR FOR THE 2020 TAX YEAR

2020 is the year of the virtual meeting and our Taxware Systems Annual Seminar has been transformed into a series of live webinars that will be held on **December 15th, 16th, 17th** beginning at **9AM PT**.

Register for each session you plan to attend. You will receive a Zoom link and password for each session.

### SESSIONS AVAILABLE

DECEMBER 15TH  
AT 9AM PT

REGISTER HERE

Welcome 2020, Program  
Highlights &  
Enhancements, Tech  
Support Tips

DECEMBER 15TH  
AT 1PM PT

REGISTER HERE

**NEW!** How Textellent Can  
Benefit My Tax Practice

DECEMBER 16TH  
AT 9AM PT

REGISTER HERE

Wintax NextGen 1040 &  
Review of New laws and  
E-File

DECEMBER 17TH  
AT 9AM PT

REGISTER HERE

Entity 101

DECEMBER 17TH  
AT 11AM PT

REGISTER HERE

Business Builder Session

Most events that turned virtual kept the same pricing as if it was a live event.  
Not Taxware - **No Food, No Travel, No Charge!** Yet there will be fun prize giveaways for every session.



THANK YOU TO OUR PRIZE SPONSORS!



**FREE SERVICE FOR 2020 TAX  
YEAR FOR ONE ERO**  
(ACTIVATION AND SUBSCRIPTION WAIVED)  
\$450 RETAIL VALUE



**FREE ONE YEAR SUBSCRIPTION**  
\$300 RETAIL VALUE



**2 FREE 1 YEAR SUBSCRIPTIONS**  
\$279 RETAIL VALUE EACH



**\$150 GIFT CARD**



**YETI ROADIE 20 COOLER**



**AMAZON FIRE HD10**



**YETI ROADIE 20 COOLER**

## PROGRAM RELEASE

The initial release of our 2020 Tax Year software will be available for download by December 18th 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.

## PROFORMA ORGANIZER

The Proforma Organizer has been updated for the 2020 tax season. It is available to download on our website at the provided link below. If you are currently registered through our website and we have your current e-mail address, you should have received an e-mail notification with a link to this newsletter. If you didn't receive an e-mail notification, please go to our website and register. This also enables you to use all of the additional support tools available to you on our website.

[taxwaresystems.com/users/clientLandingPage.asp](http://taxwaresystems.com/users/clientLandingPage.asp)

## 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](http://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](http://taxwaresystems.com/bank-products)



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](http://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/](http://taxwaresystems.com/thetaxbook/)



Join our webinar on Tuesday, December 15th at 1PM PT to learn more about how the Textellent integration in your Wintax 1040 program can help to grow your business.

**December 15<sup>th</sup>, 2020 at 1:00PM PT**



## TECH TIPS

As the 2020 tax year approaches, we at Taxware Systems would like to remind tax preparers that protecting taxpayer information is extremely important.

This includes protection from environmental risks (e.g. fire, water, tornado, earthquake), business resources (e.g. equipment failure, supply chain disruption, employees) and hostile actors (e.g. hackers, criminals, nation-state actors). The latter has been on the rise in recent years and tax professionals should be prepared for each of these risks. Read more on our blog about how we recommend protecting your client data.

[taxwaresystems.com/protecting-your-client-data](http://taxwaresystems.com/protecting-your-client-data)

## FOLLOW US ON

**facebook**

[FB.COM/TAXWARESYSTEMS](https://fb.com/taxwaresystems)

**YouTube**

TAXWARE SYSTEMS



## A MAGICAL TIME FOR THE TAXWARE TEAM

With all the changes and restrictions required of businesses it seemed that having our traditional Taxware holiday celebration in the summer might be impossible. We were thrilled to learn that our former employee and Magnificent Magician, Greg @Handcraftedmysteries had created a safe environment that we could all enjoy his show entitled Bonfire. What a great night to be together as many of our staff are working remotely in response to the threat of the COVID-19 pandemic.



*We are thankful for you!*



### REFER-A-FRIEND LIMITED TIME OFFER

This year is like no other. The tradeshow and events we would normally attend to share and sell our programs have all been cancelled. **We ALWAYS appreciate your referrals but this year it would mean so much more.**

**If you refer someone to us, and they sign up by Christmas, we will give you \$150 (regularly \$100) off of your software.**

Ask your friends to call us today at 800-877-1065, so they can also -

**EXPERIENCE THE TAXWARE DIFFERENCE**

