

SORTING OUT SOFTWARE



Welcome to NATP's 20th Annual Sorting Out Software Survey. NATP has gathered information about tax software products and compiled them into a summary to assist you in making an informed tax software decision. The information contained in this survey comes from two sources: the software vendors and the 736 NATP members (the users) who completed and submitted our questionnaires.

Software packages generally come in two forms. The "form oriented" style allows the preparer to complete the return in front of the client, many times with supporting worksheets to list the components that make up a line entry. The preparer is usually able to view the return on the monitor, as it would appear on paper. "Worksheet oriented" programs are set up differently by each software vendor. A preparer who is used to working with forms may find this type a little more difficult at first. Some programs allow a "heads down" form of data entry that requires only a code number for the data field on the worksheet followed by the numeric and/or alphabetic data. This capability allows a skilled 10-key/typist to enter data without being concerned about matching the data fields on the screen with those on the worksheet.

Price is always a crucial consideration. The most frequent comment on the NATP user survey concerned pricing. Evaluating everything the price includes is time-consuming, but will help you determine the best software at the best price for your needs. Some software companies include corporation, partnership, and fiduciary software, laser software, and related state programs for one price while some companies list them separately. Most software companies offer discounts based on the date the order is placed.

The shipping date is another consideration. The earlier you receive the package, the more time you will have to work with it before the rush of tax season arrives. Pending tax legislation or legislation passed close to the end of the year can affect the release of forms, which will affect the shipping date of some programs. With many packages providing web-based downloads for updates,

late-breaking legislative changes are less of a problem. The faster your Internet connection, the less time you will spend downloading updates.

Changing tax software packages can be more difficult than choosing one for the first time. The price of the program, its capability, and your particular needs are all noteworthy considerations. Many software providers have conversion programs that convert the data from your old program to their program. These programs are like any other computer software and may contain bugs. If you use a conversion program, verify that the information

has been transferred correctly. There is a lot of data to be transferred including birth dates, capital loss carryovers, net operating loss carryovers, and depreciation records just to name a few.

The software choice you make should reflect personal opinion, computer experience, preference in entry modes, size of practice, cost, availability of state software, etc. Therefore, the National Association of Tax Professionals (NATP) is not recommending one particular package over another, nor will we attempt to rank packages.

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"At one time, I did all my returns by hand. Now, I'd have to retire if I didn't have my tax software!"

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—NATP Member

As a paid tax professional, you are responsible for the accuracy of the entire tax return, including the correct reporting of all income and expenses. You have to know if the results shown on a prepared tax return are reasonable based on your tax knowledge. An NATP member said it best; "No tax software replaces tax knowledge. If you expect it to, you are not being realistic. Continue learning at all times so your tax software works for you. If you expect to be led by your software, you won't be giving your clients the best service."

Keep in mind that tax software is not infallible. It is imperative that you understand the complicated rules of alternative minimum tax, net operating losses, and the new domestic production activities deduction, to name a few. Some software may require complicated calculations before the correct deduction is entered on the tax return. Relying only on your software and not your knowledge may be a critical mistake.

Good luck in your search for the tax software program that is right for you.

The May 2006 issue of *TAXPRO Monthly* contained a request for our members to share information about the software they used during the last tax season. This was strictly an informal, nonscientific survey. The survey was also available online at www.natptax.com.

There were 736 members who responded to the survey representing 19 different software packages.

We asked users to rank their tax software program, customer support, network, and the conversion package on a scale from 1 to 5, using 1 as very dissatisfied and 5 as very satisfied. The average overall satisfaction ratings were 4.38 (software), 4.25 (customer support), 4.35 (network version), and 3.72 (conversion package). 86 percent of the users said they would continue to use the same package for the coming year. Those undecided came to 10 percent, while 4 percent were a definite “no.”

Congress has directed the IRS to have 80 percent of returns e-filed by 2007. Through April 21, 2006, 70 million returns were accepted through e-filing. The IRS expects this number to increase before the close of the e-filing season in October. During this past tax season, the number of e-filed returns submitted during tax season by paid tax professionals increased 9.4 percent over last year to over 50 million. Self-prepared computer e-filing increased more than 18 percent to nearly 20 million returns. As a result, the users survey requested information regarding electronic filing. Not all responders answered all the questions in this area. The percentages given are based on those who answered the specific questions.

Electronic filing results: 90 percent (88 percent in 2005 survey) of the responders offered electronic filing, transmitting 89 percent (74 percent in 2005) of their eligible returns. 19 percent (22 percent in 2005) of e-filers charged a separate fee for the service. 93 percent (90 percent in 2005) of responders plan to offer electronic filing for 2006 returns. Of these, 19 percent (23 percent in 2005) plan to charge a separate fee for the service.

For those who do not e-file, the most common reasons were that it is time consuming, too expensive, deals with privacy issues, and that their clients have not asked for it.

Note: Due to rounding, some percentages may not total 100 percent.

A software company is only listed in this portion of our report if there were at least 10 User Responses.

User Responses

Satisfaction rating based on scale of 1-5

	2nd Story Software,	Inc.ATX/Kleinrock
Number of respondents	20	86
Average number of returns	97	268
Average satisfaction rating with product this year	4.37	4.06
Average satisfaction rating with product last year	4.23	4.12
Average satisfaction rating with support this year	4.18	3.82
Average satisfaction rating with support last year	4.25	4.00
Number of network users	5	22
Average satisfaction with operations on a network this year	3.60	3.86
Average satisfaction with operations on a network last year	4.50	4.00
Number of conversion package users	2	8
Average satisfaction with conversion package	4.00	2.50
Use again next year? Percent who said “yes”	85	84
Use again next year? Percent who said “no”	0	2
Use again next year? Percent who are undecided	15	14
Percent who offered e-filing this year	70	86
Percent of federal returns e-filed	73	82
Percent of e-filers who charged for e-filing this year	43	11
Percent who plan to offer e-filing next year	70	87
Percent who plan to charge for e-filing next year	25	10
Percent who offer bank products to clients as part of e-filing service	0	17

User Responses

Satisfaction rating based on scale of 1-5

	CCH A Wolters Kluwer Business	Drake Software	Dunphy Systems, Inc. (Acquired by Thomson Creative Solutions)	Intuit/Lacerte Tax	Intuit/ProSeries	RCS Taxslayer	TaxWorks	Thomson Creative Solutions	Universal Tax Systems, Inc.
Number of respondents	26	162	12	93	130	24	25	79	57
Average number of returns	495	823	991	565	349	329	486	650	519
Average satisfaction rating with product this year	4.12	4.56	4.75	4.31	4.42	4.96	4.48	4.5	3.98
Average satisfaction rating with product last year	4.25	4.26	4.17	4.33	3.96	4.13	3.97	4.27	4.15
Average satisfaction rating with support this year	4.08	4.65	4.58	3.94	4.05	4.96	4.48	4.64	3.96
Average satisfaction rating with support last year	4.13	4.35	4.40	4.13	3.47	4.43	3.90	4.24	4.09
Number of network users	13	81	6	49	31	9	14	45	26
Average satisfaction with operations on a network this year	4.62	4.64	4.67	4.12	4.06	5.00	4.57	4.38	4.15
Average satisfaction with operations on a network last year	4.55	4.38	4.57	4.09	3.72	4.30	4.25	4.00	4.36
Number of conversion package users	2	31	1	8	14	4	6	11	11
Average satisfaction with conversion package	4.00	3.90	2.00	4.25	3.43	3.25	3.50	4.27	3.82
Use again next year? Percent who said "yes"	81	95	58	74	90	100	96	84	79
Use again next year? Percent who said "no"	4	2	42	4	3	0	4	5	9
Use again next year? Percent who are undecided	15	3	0	22	7	0	0	11	12
Percent who offered e-filing this year	73	97	58	90	92	100	88	89	98
Percent of federal returns e-filed	73	88	59	76	74	91	79	76	86
Percent of e-filers who charged for e-filing this year	21	10	43	29	31	25	14	23	16
Percent who plan to offer e-filing next year	85	99	75	94	93	96	92	90	98
Percent who plan to charge for e-filing next year	19	11	33	26	28	21	16	20	16
Percent who offer bank products to clients as part of e-filing service	4	38	0	8	8	63	24	9	28

PARTICIPATING FIRMS

2nd Story Software, Inc.

5925 Dry Creek Lane, NE
Cedar Rapids, IA 52402
TaxACT
800.573.4287
319.447.4674 (fax)
www.taxact.com

ATX/Kleinrock

63 Sweden Street
P.O. Box 1040
Caribou, ME 04736
1040, 1040 Office, MAX®,
MAX® Office, and Total Tax
Office™
877.728.9776
207.498.4289 International
800.285.5076 (fax)
www.atxinc.com

CCH

A Wolters Kluwer Business
2700 Lake Cook Road
Riverwoods, IL 60015
ProSystem fx Tax
800.739.9998
www.CCHGroup.com

Drake Software

235 E. Palmer Street
Franklin, NC 28734
Drake Software
800.890.9500
828.369.9928 (fax)
www.drakesoftware.com

Greatland Corporation

2480 Walker Avenue NW
Grand Rapids, MI 49544
Great Tax
800.968.1099
800.829.1881 (fax)
www.greattaxpro.com

HowardSoft

7852 Ivanhoe Avenue
LaJolla, CA 92037
Tax Preparer
858.454.0121
800.24.TAXES (fax)
www.howardsoft.com

Intuit

5601 Headquarters Drive
Plano, TX 75024
Lacerte Tax
800.765.7777
214.387.2791 (fax)
www.lacertesoftware.com

Intuit

5601 Headquarters Drive
Plano, TX 75024
ProSeries
800.934.1040
800.685.7036 (fax)
www.proseries.com

NTS Services Corp.

205 Enterprise Drive
Pekin, IL 61554
TaxVision
800.687.1096
309.353.7176 (fax)
www.ntslink.com

Orrtax Software Solutions

15395 SE 30th, Ste. 300
Bellevue, WA 98007
IntelliTax for Windows
425.649.8291
425.649.8201 (fax)
www.orttax.com

PDP Tax Service

5510 Pearl Road, Suite 303
Parma, OH 44129
Electro-1040
800.359.1040
440.884.7500 (fax)
www.pdptax.com

Petz Enterprises, Inc.

7575 W. Linne Road
P.O. Box 611
Tracy, CA 95378
CrossLink
VTax
800.345.4337
209.835.2758 (fax)
www.petzent.com

RCS Taxslayer

610 Ronald Reagan Drive
Evans, GA 30809
Taxslayer Pro
888.420.1040
706.868.1955 (fax)
www.taxslayerpro.com

RIA

2395 Midway Road
Carrollton, TX 75006
GoSystem Tax
GoSystem Tax RS
800.726.1040
972.447.6049 (fax)
gosystem.thomson.com

Softax, Inc.

130 Crestview Drive
Maplewood, MN 55119
Softax
651.731.5318
651.731.8011 (fax)
www.softax-inc.com

TAX\$IMPLE

AJV Computerized Data
Management, Inc.
8 Emery Avenue
Randolph, NJ 07869
TAX\$IMPLE
800.989.8955
www.taxsimple.com

Taxsoftware.com

Bethesda, MD
301.320.7080
301.320.1216 (fax)
www.taxsoftware.com

Taxware Systems

924 W. 9th Street
Upland, CA 91786
Taxware 1040 Wintax
800.877.1065
909.931.3199 (fax)
www.taxwaresystems.com

TaxWorks

350 N. 400 West
Kaysville, UT 84037
TaxWorks
800.230.2322
801.544.5699 (fax)
www.taxworks.com

Thomson Creative Solutions

7322 Newman Boulevard
Dexter, MI 48130
UltraTax CS
800.968.8900
734.426.3750 (fax)
www.CreativeSolutions.
Thomson.com

Universal Tax Systems, Inc.

6 Mathis Drive, NW
Rome, GA 30165
TaxWise
800.755.9473
706.624.4256 (fax)
www.taxwise.com

State	Software Packages Supported																					
	2nd Story Software, Inc.	ATX/Kleinrock	CCH, A Wolters Kluwer Business	Drake Software	Greatland Corporation	HowardSoft	Intuit/Lacerte Tax	Intuit/ProSeries	NTS Services Corp.	Orrtax Software Solutions, Inc.	PDP Tax Service	Pelz Enterprises, Inc.	RCS Taxslayer	RIA	Softax, Inc.	Storen Tax Service	TAX\$IMPLE	Taxsoftware.com	Taxware Systems	TaxWorks	Thomson Creative Solutions	Universal Tax Systems, Inc.
Alabama	X	X	X	X	X		X	X	X	X		X	X	X			X	X	X	X	X	X
Alaska		X	X	X	X				X	X		X	X	X			X		X	X	X	X
Arizona	X	X	X	X	X		X	X	X	X		X	X	X			X		X	X	X	X
Arkansas	X	X	X	X	X		X	X	X	X		X	X	X			X	X	X	X	X	X
California	X	X	X	X	X	X	X	X	X	X		X	X	X			X		X	X	X	X
Colorado	X	X	X	X	X		X	X	X	X		X	X	X			X	X	X	X	X	X
Connecticut	X	X	X	X	X		X	X	X	X		X	X	X			X	X	X	X	X	X
Delaware	X	X	X	X	X		X	X	X	X		X	X	X			X	X	X	X	X	X
DC	X	X	X	X	X		X	X	X	X		X	X	X			X	X	X	X	X	X
Florida		X	X	X	X		X	X	X	X		X	X	X			X	X	X	X	X	X
Georgia	X	X	X	X	X		X	X	X	X	X	X	X	X			X	X	X	X	X	X
Hawaii	X	X	X	X	X		X	X	X	X		X	X	X			X		X	X	X	X
Idaho	X	X	X	X	X		X	X	X	X		X	X	X			X	X	X	X	X	X
Illinois	X	X	X	X	X		X	X	X	X	X	X	X	X	X		X	X	X	X	X	X
Indiana	X	X	X	X	X		X	X	X	X	X	X	X	X		X	X	X	X	X	X	X
Iowa	X	X	X	X	X		X	X	X	X	X	X	X	X	X		X	X	X	X	X	X
Kansas	X	X	X	X	X		X	X	X	X	X	X	X	X			X	X	X	X	X	X
Kentucky	X	X	X	X	X		X	X	X	X		X	X	X			X	X	X	X	X	X
Louisiana	X	X	X	X	X		X	X	X	X	X	X	X	X			X	X	X	X	X	X
Maine	X	X	X	X	X		X	X	X	X		X	X	X			X		X	X	X	X
Maryland	X	X	X	X	X		X	X	X	X	X	X	X	X			X	X	X	X	X	X
Massachusetts	X	X	X	X	X		X	X	X	X		X	X	X			X		X	X	X	X
Michigan	X	X	X	X	X		X	X	X	X	X	X	X	X			X	X	X	X	X	X
Minnesota	X	X	X	X	X		X	X	X	X		X	X	X	X		X		X	X	X	X
Mississippi	X	X	X	X	X		X	X	X	X		X	X	X			X	X	X	X	X	X
Missouri	X	X	X	X	X		X	X	X	X	X	X	X	X			X	X	X	X	X	X
Montana	X	X	X	X	X		X	X	X	X		X	X	X			X	X	X	X	X	X
Nebraska	X	X	X	X	X		X	X	X	X		X	X	X	X		X		X	X	X	X
Nevada		X	X	X	X				X	X		X	X	X			X	X	X	X	X	X
New Hampshire	X	X	X	X	X		X	X	X	X		X	X	X			X	X	X	X	X	X
New Jersey	X	X	X	X	X		X	X	X	X	X	X	X	X			X	X	X	X	X	X
New Mexico	X	X	X	X	X		X	X	X	X		X	X	X			X	X	X	X	X	X
New York	X	X	X	X	X		X	X	X	X	X	X	X	X			X		X	X	X	X
North Carolina	X	X	X	X	X		X	X	X	X	X	X	X	X			X	X	X	X	X	X
North Dakota	X	X	X	X	X		X	X	X	X		X	X	X	X		X	X	X	X	X	X
Ohio	X	X	X	X	X		X	X	X	X	X	X	X	X			X	X	X	X	X	X
Oklahoma	X	X	X	X	X		X	X	X	X		X	X	X			X	X	X	X	X	X
Oregon	X	X	X	X	X		X	X	X	X		X	X	X			X	X	X	X	X	X
Pennsylvania	X	X	X	X	X		X	X	X	X		X	X	X			X		X	X	X	X
Rhode Island	X	X	X	X	X		X	X	X	X		X	X	X			X		X	X	X	X
South Carolina	X	X	X	X	X		X	X	X	X		X	X	X			X		X	X	X	X
South Dakota		X	X	X	X				X	X		X	X	X			X	X	X	X	X	X
Tennessee		X	X	X	X		X	X	X	X		X	X	X			X	X	X	X	X	X
Texas		X	X	X	X		X	X	X	X		X	X	X			X	X	X	X	X	X
Utah	X	X	X	X	X		X	X	X	X		X	X	X			X	X	X	X	X	X
Vermont	X	X	X	X	X		X	X	X	X		X	X	X			X			X	X	X
Virginia	X	X	X	X	X		X	X	X	X	X	X	X	X			X		X	X	X	X
Washington		X	X	X	X				X	X		X	X	X			X	X	X	X	X	X
West Virginia	X	X	X	X	X		X	X	X	X	X	X	X	X			X	X	X	X	X	X
Wisconsin	X	X	X	X	X		X	X	X	X		X	X	X	X		X	X	X	X	X	X
Wyoming		X	X	X	X				X	X		X	X	X			X	X	X	X	X	X

Software Vendor Software Program

	PRICE 2006 1040 PACKAGE	PRICE 2006 RENEWAL	PRICE 2006 STATE PACKAGE	PRICE 2006 STATE RENEWAL	PAY-PER-RETURN PRICING	LICENSING AGREEMENT RESTRICTIONS	DATE 2006 1040 PACKAGE SHIPPED	EXPECTED 2006 DELIVERY DATE
2nd Story Software, Inc. TaxACT	\$99	\$79	\$12.95/state or \$51.80/all states	n/a	n	n	1/10/06	1/10/07
ATX/Kleinrock 1040, 1040 Office, MAX®, MAX® Office, Total Tax Office™	\$390 1040 pkg. \$595 1040 Office	10% off until 6/02/06	1040 pkg. inc. 3 1040 Office inc. all	10% off until 6/02/06	y	y	12/05	12/06
CCH, a Wolters Kluwer Business ProSystem fx Tax	\$3,125	call for details	\$335-\$795	call for details	y	n	12/05	12/06
Drake Software Drake Software	\$995-\$1,395	\$995-\$1,395	included	included	y	n	11/29/05	11/29/06
Greatland Corporation Great Tax	\$380-\$2,560	discounts available	included in packages	—	y	n	12/05	12/06
HowardSoft Tax Preparer	\$229 for standard level	\$229	\$189 for standard level	\$189	n	n	1/06	1/07
Intuit Lacerte Tax	\$2,250 unlimited use	—	—	—	y	—	12/12/05	—
Intuit ProSeries	\$999 unlimited use w/all ind. states	—	\$999 unlimited use w/all ind. states	—	y	—	—	—
NTS Services Corp. TaxVision	\$800	\$640	\$900	\$720	—	n	12/21/05	12/21/06
Orrtax Software Solutions IntelliTax for Windows	\$1,495 incl. 1040 & business	\$897 until 8/31/06	included	included	n	y	11/04/05	11/29/06
PDP Tax Service Electro-1040	\$149-\$499	50% discount	\$99-\$129	50% discount	y	y	1/5/06	1/5/07
Petz Enterprises, Inc. CrossLink	\$695	30% discount before 5/30/06	\$295-\$495 based on state	—	n	n	12/8/05	12/10/06
Petz Enterprises, Inc. VTax	\$2,500 for 1st 10 offices; \$50 ea. add.	30% discount before 5/30/06	Included	—	y	n	12/8/05	12/10/06
RCS Taxslayer Taxslayer Pro	\$995	\$795	included	included	n	n	12/05/05	12/05/06
RIA GoSystem Tax and GoSystem Tax RS	beginning at \$2,500	same	included	included	n	y	12/2/05	12/1/06
Softax, Inc. Softax	\$599	same	\$100	same	n	n	1/7/06	1/7/07
TAX\$IMPLE, AJV Computerized Data Management, Inc. TAX\$IMPLE	\$245-\$695	\$125-\$645	\$125-\$245	\$95-\$225	y	y	1/2/06	12/27/06
Taxsoftware.com Taxsoftware.com	\$199	\$99	included	included	y	n	1/02/06	1/02/07
Taxware Systems Taxware 1040 Wintax	\$1,250	\$1,250	included	included	n	n	12/26/05	12/31/06
TaxWorks TaxWorks	\$1,195	\$1,095	\$345	\$200	y	n	12/29/05	12/28/06
Thomson Creative Solutions UltraTax CS	\$2,000	\$1,750	\$225-\$525	\$225-\$525	y	y	11/21/05	11/20/06
Universal Tax Systems, Inc. TaxWise	\$595	\$476	\$195 one state \$695 45 states	\$156 one state \$556 45 states	y	n	12/15/05	12/15/06

Software Vendor Software Program

	NUMBER OF UPDATES IN 2005	UPDATES AVAILABLE ONLINE	NUMBER OF USERS FOR 2005 PACKAGE	% OF RENEWALS FROM 2004 PACKAGE	TOLL FREE NUMBER FOR SUPPORT	HOURS SUPPORT AVAILABLE (EST) DURING TAX SEASON	HOURS SUPPORT AVAILABLE (EST) DURING OFF SEASON	NUMBER OF SUPPORT STAFF DURING TAX SEASON	NUMBER OF YEARS IN BUSINESS
2nd Story Software, Inc. TaxACT	4	y	n/a	n/a	n	9am-10pm sa 9-6; su 1-6	9-6	75	9
ATX/Kleinrock 1040, 1040 Office, MAX®, MAX® Office, Total Tax Office™	4+	y	50,000+	90%	y	8am-midnight sa 9-5	8am-10pm sa 9-5	200+	14
CCH, a Wolters Kluwer Business ProSystem fx Tax	10	y	20,000+	95%+	y	8:30am-9:30pm; sa 9-8 su 10-6; 24-hour 4/11-4/15	9-8	450+	40+
Drake Software Drake Software	5	y	20,200+	92% - 96%	n	8am-10pm	8am-9pm	228	28
Greatland Corporation Great Tax	4	y	—	—	n	extended hours during tax season	9-6	—	30+
HowardSoft Tax Preparer	n/a	y	n/a	n/a	y fax	11-9 sa noon-5 as needed	12-7:30	n/a	27
Intuit Lacerte Tax	—	—	—	—	y	9-9; sa 10-5; su 12-5 24-hr. last week of season	9-8	170	25
Intuit ProSeries	—	—	—	—	y	7:30am-12am; sa 10-5; su 12-5 24- hr. last week of season	9-8	450	20
NTS Services Corp. TaxVision	near daily	y	2,000	90%	y	10-10	10-6	40	17
Orrtax Software Solutions IntelliTax for Windows	10	y	63,000	97%	y	8am-midnight	11-7	106	21
PDP Tax Service Electro-1040	3	y	275	92%	y	9-9	9-4	3-4	22
Petz Enterprises, Inc. CrossLink	—	y	—	97%	y	24/7	5:30am- 1:30 pm	45	32
Petz Enterprises, Inc. VTax	web based	—	—	97%	y	24/7	5:30am- 1:30 pm	45	32
RCS Taxslayer Taxslayer Pro	4	n	4,000	97%	n	8am-11pm mon-sun	8-5	25	40
RIA GoSystem Tax and GoSystem Tax RS	8	y	75,000	99.8%	y	8:30am-9:30pm sa 9-6; su 10-5	9-8	138	41
Softax, Inc. Softax	3	n	—	97%	y	8am-9pm	8-5	—	23
TAX\$IMPLE, AJV Computerized Data Management, Inc. TAX\$IMPLE	2	y	n/a	92%	y	8-8 sa 10-2	8:15-5	n/a	23+
Taxsoftware.com Taxsoftware.com	web based	y	10,000+	—	n	8am-11:59pm mon-sun	8-7	varies	13
Taxware Systems Taxware 1040 Wintax	various	y	—	96%	y	9-9	11-8	various	26
TaxWorks TaxWorks	4	y	6,000	90%+	y	9am-10pm	10-7	123	34
Thomson Creative Solutions UltraTax CS	4 CD's	y	20,000+	95%+	y	9am-10pm; sa 9-6 select su	9-8	150+	25+
Universal Tax Systems, Inc. TaxWise	4	y	75,000	95%	y	7:30am-midnight	8:30-6	300	20

Software Vendor Software Program

	MINIMUM RAM RECOMMENDED	PROGRAM SIZE IN MB	ADDITIONAL COST FOR ELECTRONIC FILING SOFTWARE	ADDITIONAL COST PER ELECTRONICALLY FILED RETURNS	DIRECT FILING OR SERVICE BUREAU	CLIENT DATA STORED SECURELY	CONVERSION PACKAGE AVAILABLE	COST OF CONVERSION PACKAGE
2nd Story Software, Inc. TaxACT	16mb	27mb	n	y	sb	y	n	n/a
ATX/Kleinrock 1040, 1040 Office, MAX®, MAX® Office, Total Tax Office™	128mb	350mb	n	free	both	y	y	free
CCH, a Wolters Kluwer Business ProSystem fx Tax	256mb	100mb	y	\$3 per return unlimited available	both	y	y	free
Drake Software Drake Software	128mb 64mb win98/2000/nt	95mb	n	n	sb	y	y	included
Greatland Corporation Great Tax	128mb	varies dep. on package	n	buydown options available for unlimited e-filing	sb	y	y	included in demo
HowardSoft Tax Preparer	64mb	1mb min 60mb max	n	\$0-\$5.95 depending on package	both	y	n	n/a
Intuit Lacerte Tax	128mb	1040 & 1 state 40-50mb	y	y	—	—	y	free
Intuit ProSeries	128mb	200mb	y	y	—	—	y	free
NTS Services Corp. TaxVision	128mb	102mb	n	free	both	y	y	free
Orrtax Software Solutions IntelliTax for Windows	128mb	90mb	n	\$0-\$3 varies with package	sb	n	y	free
PDP Tax Service Electro-1040	640k dos 16mb win	10mb	sb \$0 direct \$300	yes for service bureau	both	n	y	n/a
Petz Enterprises, Inc. CrossLink	128mb	15mb	n	y	sb	y	y	free
Petz Enterprises, Inc. VTax	—	—	n	n	sb	y	n	—
RCS Taxslayer Taxslayer Pro	128mb	75mb	n	n	both	y	y	free
RIA GoSystem Tax and GoSystem Tax RS	256mb	305mb	n	y	direct	y	y	\$12 per return
Softax, Inc. Softax	256mb	13mb	y	—	both	n	n	n/a
TAX\$IMPLE, AJV Computerized Data Management, Inc. TAX\$IMPLE	256k	40mb	depends on service	depends on service	direct	y	y	free
Taxsoftware.com Taxsoftware.com	any	online product	n	n	—	y	n	n/a
Taxware Systems Taxware 1040 Wintax	128mb	50mb	n	n	both	n	y	included
TaxWorks TaxWorks	128mb	100mb	n	y	sb	y	y	free
Thomson Creative Solutions UltraTax CS	512mb	20mb	n	y	both	y	y	free
Universal Tax Systems, Inc. TaxWise	128mb	20mb	n	varies by package	both	y	y	free

Software Vendor Software Program

	VERSIONS AVAILABLE: DOS, WINDOWS 3.1, 95, 98, 2000, NT, ME, XP, WINDOWS SERVER 2003	RECOMMENDED OPERATING SYSTEM	ONLINE TAX PREPARATION OPTION	MULTI-STATE PACKAGE AVAILABLE	BATCH PROCESSING	IRS DATA DISPLAYED ON SCREEN	HEADS DOWN DATA ENTRY
2nd Story Software, Inc. TaxACT	win95/98/me/2000/xp	win95 & up	n	y	y	n	n
ATX/Kleinrock 1040, 1040 Office, MAX®, MAX® Office, Total Tax Office™	win98 and up	xp	n	y	y	y	n
CCH, a Wolters Kluwer Business ProSystem fx Tax	win me/2000/xp	xp	y	y	y	y	y
Drake Software Drake Software	win98/2000/nt/me/xp	win98 & up	y	y	y	y	y
Greatland Corporation Great Tax	win	win2000/xp/Vista/2003	n	y	n	y	n
HowardSoft Tax Preparer	dos all win versions	win95 & up	n	n	n	y	y
Intuit Lacerte Tax	win98/me/nt/2000/xp	xp	n	y	y	y	y
Intuit ProSeries	win98/me/nt/2000/xp	win2000/xp	n	y	y	y	y
NTS Services Corp. TaxVision	win xp	xp	n	y	n	y	y
Orrtax Software Solutions IntelliTax for Windows	win	win2000/xp	n	y	y	y	n
PDP Tax Service Electro-1040	dos win3.1 and up	dos 6.1 win98 & up	n	y	n	n	y
Petz Enterprises, Inc. CrossLink	win2000/xp	xp	n	y	y	n	n
Petz Enterprises, Inc. VTax	win2000/xp	xp	y	y	y	n	n
RCS Taxslayer Taxslayer Pro	win2000/nt/xp	xp	n	y	n	y	y
RIA GoSystem Tax and GoSystem Tax RS	win and ASP	xp	y	y	y	y	y
Softax, Inc. Softax	win	xp	n	y	y	—	n
TAX\$IMPLE, AJV Computerized Data Management, Inc. TAX\$IMPLE	win2000/nt/xp	xp	y	y	y	y	y
Taxsoftware.com Taxsoftware.com	win	any	y	y	y	y	y
Taxware Systems Taxware 1040 Wintax	win98/2000/xp	win2000/xp	n	y	y	y	y
TaxWorks TaxWorks	win	xp	y	y	y	y	y
Thomson Creative Solutions UltraTax CS	win incl. 2006.1	win 2000/xp	y	y	y	y	y
Universal Tax Systems, Inc. TaxWise	win	win2000/xp	y	y	y	y	n

