

TAXWARE TIMES

FALL 2024
SINCE 1979



CELEBRATING 45 YEARS OF INNOVATION AND PARTNERSHIP WITH TAXWARE SYSTEMS!

Dear Taxware Family,

This year marks a truly special milestone for us at Taxware Systems - we're celebrating **45 incredible years** of providing trusted, innovative income tax preparation software! Since 1979, we've been on a mission to empower tax professionals like you with cutting-edge tools that make your job easier and your clients happier. From our humble beginnings to becoming a leader in the tax software industry, none of this would have been possible without your loyalty, feedback, and partnership.

As we reflect on our journey, it's impossible not to think about how much the tax landscape has evolved. Through all the changes in tax laws, technology advancements, and the ever-growing complexity of the tax world, one thing has remained constant - our commitment to delivering reliable, user-friendly software that meets your needs. Our growth and success are the direct results of your trust and support.

We recently asked for stories about your own experiences with Taxware Systems over the years, and we were blown away by the heartfelt responses! Your stories, about how our software has helped streamline your practice, and our dedicated support team has been an asset to your tax season, have reaffirmed why we do what we do. It's these relationships, built over decades, that inspire us to keep innovating and enhancing our products for you.

Now, it's time for the exciting part! We are thrilled to announce the winner of our 45th Anniversary Gift Card Giveaway!

Congratulations to Curtis R. from Lafayette, IN, whose story touched our hearts and captured the essence of our long-standing partnership. Thank you to everyone who shared their memories with us - you truly are the foundation of our success.

As we look ahead to the next 45 years (and beyond!), we remain committed to being your trusted partner in tax preparation. Here's to many more years of growth, innovation, and success - together!

Warm regards,
The Taxware Systems Team

Thank you for 45 wonderful years!

♥ Read more of your letters on the About Us page on our website.

45TH ANNIVERSARY 1979 - 2024

In 1984 mom decided to strike out on her own and start her own tax and bookkeeping service. It was a little after that from the recommendation of another accountant, she was told about this tax software company named Taxware. Not being very computer savvy, she decided to call me and set up taxware programming on this awesome 386, and then to set up a printer that would communicate with the software and the 386 (that was fun) thinking that's all we had to do. Then I would get phone calls and she would let me know that Taxware sent a disk to her through the mail and thought that might be an update, but wasn't sure what to do with it. I took over in 1997, mom has since passed, but 40 years later the family business (& Taxware) are still going strong.

Curtis R.



Letters from you!

I have been using Taxware Software since 1980 or 81 when the CPA I was working for during college signed up. I was so happy that I could throw away my whiteout as we did everything by hand and there were always changes. After college, working for a CPA firm getting my license and a stint in the corporate world I started my own practice and of course became a Taxware client in 1991.

In my professional career Taxware is absolutely #1. Excellent product, amazing support and great staff!!!

Thank YOU for all the hard work you all do to make our tax seasons flow smoothly.

Matthew N. - Palm Springs, CA



I have been a professional preparer for 35 years. Not exactly sure when I started using your software, but I know it has been a long time (most of my career). Your staff has always been prompt, knowledgeable, courteous, friendly and overall top notch.

Keep up the great work, I look forward to working with you for many more years.

John B. - Los Angeles, CA



TECH TIPS

BACK-UP YOUR CLIENT DATA

Every year we get calls from clients about computer failures. If your computer fails and you do not have a back-up, there is little we can do for you. Getting a recovery made from failed hardware can be expensive and is not guaranteed to work.

Spend 5 minutes today to make a back-up that will save you hundreds of dollars and countless hours of data entry.

If you need help creating a back-up give technical support a call at 800.877.1065 and they will be happy to help!

OUR SALES TEAM ENGAGED WITH TAX PROS AT EDUCATIONAL EVENTS ACROSS THE U.S.

Over the past few months, the Taxware Systems Sales team had the pleasure of attending multiple tax professional educational events in Las Vegas, Dallas, Orlando, and San Diego. These gatherings allowed our team to connect with current clients and meet a diverse group of tax professionals eager to learn more about our software solutions.

Each event was an exciting opportunity to engage with industry experts, exchange ideas, and receive valuable feedback from clients who have been using our software for years. It's always rewarding to hear directly from the professionals who rely on our tools to streamline their operations and provide quality service to their clients.

We look forward to attending more events in the future and maintaining these invaluable connections with tax professionals from all corners of the industry. Thank you to everyone who took the time to visit our booth and share your insights!

Stay tuned for updates on where we'll be next, and we hope to see you soon.



TAXWARE SYSTEMS ANNUAL SEMINAR!

SAVE THE DATES!

November 12th & 13th, 2024 | 10AM & 11:30AM PT
December 10th & 11th, 2024 | 9AM & 11AM PT

It's that time again! Circle the dates for Taxware Systems' Annual Seminar on your calendar. We are excited to connect with numerous members of our Taxware client family during this crucial time of year. This virtual format offers an excellent opportunity to ensure your entire office team receives valuable training. Please note that one registration per individual is necessary for accessing each Zoom session. We'll send out reminders, complete with session links, both on the day and an hour prior to each specific session.

Remember, you need to register for each session you intend to join. Be on the lookout for an email containing the Zoom link and session password for each event.

Mark those calendars because Taxware has plenty of exciting updates to share!

taxwaresystems.com/seminar

TAXCOMM UPGRADED!

Introducing our latest upgrade, now live on [TaxComm.com](https://taxcomm.com).

EXCITING ENHANCEMENTS UNVEILED!

- ▶ Streamlined Tax Return Presentation
- ▶ Enhanced Scheduling and Booking
- ▶ Client Communication Portal that can be customized to your office branding.
- ▶ Seamless Billing & Credit Card Payment
- ▶ New Tax Pro Mobile App Capabilities
- ▶ Advanced Tax Client Mobile App Functionality

In just a short time, pending our final production test, TaxComm.Net will seamlessly redirect you to our cutting-edge application.

STREAMLINED TAX PRESENTATIONS

Our revamped tool for assisting tax clients has undergone a transformation, now offering improved scalability and user-friendly features

ENHANCED SCHEDULING AND BOOKING

Managing appointments is now effortless with our integrated Client Portal that can be customized to your office branding. Easily set up and share your booking calendar via email, or allow TaxComm clients to access it directly from your unique customized TaxComm webpage URL.

CUSTOMIZABLE TAX CLIENT PORTAL

Introducing personalized tax client webpages branded with your logo and company details. Enhance client interaction by providing a seamless, branded experience throughout document exchanges and task completions.

BANK ENROLLMENT NOW OPEN!

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.

Bank Enrollment Applications will be submitted through your 2023 Wintax 1040 Program. Enrollment for all four banks is now fully integrated.

Instructions on how to begin your enrollment application can be found on our website using the link below.

taxwaresystems.com/bank-enrollment-instructions

For more information on the current programs and offerings for the upcoming tax season we have linked the banks on our website link below.

taxwaresystems.com/bank-products

We have also enhanced the overall tax client experience to be as simple as possible. Overall webpage and mobile scalability has been improved so things are just easier to find and viewable in the forefront.

SEAMLESS BILLING & CREDIT CARD PAYMENT

Create and send bills directly to clients with integrated billing features. Secure payments conveniently with our Stripe integration, offering hassle-free credit card processing.

ADVANCED MOBILE APP FUNCTIONALITY FOR BOTH THE TAX PRO AND THE TAX CLIENT

Enjoy expanded capabilities with our enhanced mobile applications, now offering full functionality for both tax professionals and your tax clients. Manage everything from document uploads to tax return signings right from your mobile device.

READY TO UPGRADE TODAY?

The new version is live! Visit [TaxComm.com](https://taxcomm.com) to experience these enhancements firsthand. Your existing logins and data seamlessly transition to the new platform, ensuring continuity and ease of use.

STAY INFORMED

Access how-to videos for each new feature at: taxcomm.com/Videos

Join us on the cutting edge of tax practice management technology with TaxComm's latest innovations!

CHECK OUT THE NEW TAXCOMM TODAY!

INTERESTED IN SOFTWARE PURCHASE ASSISTANCE?

We've got great news! Now is the best time to grab Taxware Systems tax preparation software through SPA (Software Purchase Assistance) with all of our banking partners.

With SPA, you can get your program with no down payment and no interest. Loan approval dependent on previous bank product history. Rules vary per bank.

HOW DOES THE SPA PROGRAM WORK?

With the SPA program, the bank will pay for your tax software package so you don't have the headache of a payment plan, and you pay **NOTHING** upfront.

Once the new tax season begins, the amount due to your chosen bank will simply be deducted from your tax preparation fees until paid in full. You will be charged nothing more than the price of your tax software.

CONTACT YOUR TAXWARE SYSTEMS' SALES REPRESENTATIVE TODAY TO LEARN HOW TO APPLY!

FOLLOW US ON

facebook
FB.COM/TAXWARESYSTEMS

YouTube
TAXWARE SYSTEMS

TAXWARE SYSTEMS REFER-A-FRIEND PROGRAM

\$25 OFF

YOUR SOFTWARE RENEWAL
FOR EACH REFERRAL THAT
DEMOS WITH OUR TEAM.

|
&
|

\$100 OFF

YOUR SOFTWARE RENEWAL
WITH THEIR PURCHASE.

Each referral will also enter you into a raffle at our annual webinar!

You can send us your referrals through our website at taxwaresystems.com/refer-a-friend
or have them call us at **800.877.1065**. Make sure they tell us you sent them!

WAYS TO SHARE YOUR LOVE FOR TAXWARE SYSTEMS!

- ♥ Write a review on our Facebook page
- ♥ Send an email
- ♥ Phone-a-Friend
- ♥ Leave us a Google review

