

# TaxACT®

## 2011 Product Catalog

Quality, affordable tax  
preparation solutions  
for professionals



### 2011 Preparer's 1040 Bundle ..... \$559

Includes all of the following — *a value of over \$695:*

- Preparer's 1040 Edition
- Preparer's 1040 All-States Edition
- Unlimited federal e-filing
- Unlimited state e-filing

## Dear Tax Professional,

Your time and money are valuable commodities. With TaxACT, you get more of both! Our reliable, easy-to-use solutions help prepare more returns in less time and allow you to offer expanded services.

TaxACT 2011 Preparer's Editions are ready to help you maximize your productivity and bottom line. If you purchase multiple products and services, check out our Bundles on the last two pages of this catalog and on our web site at [prep.taxact.com](http://prep.taxact.com).

Don't forget the 2011 tax season marks year two of the new IRS requirements for paid tax return preparers. Are you prepared to comply? Use the checklist below and visit [prep.taxact.com](http://prep.taxact.com) for more information.

You can also visit [prep.taxact.com](http://prep.taxact.com) for product information, release dates, updates on the IRS preparer requirements, bank partners and more.

Thank you for choosing TaxACT, and I wish you a successful 2011 tax season!

Sincerely,



Lance Dunn  
President, 2nd Story Software

## IRS requirements for tax year 2011

- Renew or obtain your Preparer Tax Identification Number (PTIN) by 12/31/11.** The fastest way to apply and pay the \$64.25 annual user fee is online at [www.irs.gov/ptin](http://www.irs.gov/ptin).
- Verify whether you need to pass the new competency exam.** CPAs, attorneys, enrolled agents, some supervised preparers and those who do not prepare Form 1040 series returns are exempt. Your deadline for passing the exam is determined by the date you obtained your PTIN.
- You must e-file if you file more than 10 individual or trust returns.** If you don't yet have one, apply for an Electronic Filing Identification Number (EFIN), required for e-filing, at [www.irs.gov](http://www.irs.gov).



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## TaxACT 2011 Product Releases

- Oct. 2011 ..... Preview versions of federal editions release
- Jan. 2012 ..... Final versions of federal editions release,  
state editions release as state forms become available
- Jan. 2012 ..... Orders for TaxACT 2012 Preparer's products accepted  
– early bird pricing valid through June 30, 2012



## TaxACT Money-Back Guarantee

If you're not completely satisfied with your TaxACT Preparer's software, simply return it within 30 days of receipt for a full refund (excluding shipping and handling costs). Please mail your software to us in its original packaging, along with your packing slip for accurate refund processing and your reason for return.



## TaxACT System Requirements

- **Operating System:** Windows XP, Vista or Windows 7
- **Processor:** Pentium (or equivalent)
- **RAM:** Refer to your operating system requirements
- **Hard Drive Space:** 70 MB
- **Internet Access:** Required for e-filing and online features
- **Monitor:** 1024x768 or larger (16-bit color minimum)
- **Mouse:** Required
- **Printer:** Highly recommended
- **Web Browser:** Microsoft Internet Explorer 6.0 or greater

## TaxACT Preparer's Editions at a Glance

Federal Edition	Ideal For...	Price
Preparer's Edition (1040, 1065, 1120S, 1120)	Preparing & printing unlimited federal returns	\$119 per edition
Preparer's Enterprise Edition (1040, 1065, 1120S, 1120)	Collaborating within an existing network to prepare & print unlimited federal returns, unlimited e-mail and phone TaxPayer Support	\$199 per edition

State Edition	Available States	Price
Preparer's 1040 State	All income taxing states	\$24.95 per state \$79.95 for All-States
Preparer's 1065 State	AZ, CA, FL, GA, IA, IL, IN, KS, MD, MN, MO, NC, NJ, NY, PA, SC, TX, VA & WI	\$24.95 per state \$79.95 for All-States
Preparer's 1120S State	AZ, CA, FL, GA, IA, IL, IN, KS, MD, MN, MO, NC, NJ, NY, PA, SC, TX, VA & WI	\$24.95 per state \$79.95 for All-States
Preparer's 1120 State	AZ (new), CA, FL, GA, IA (new), IL, IN, KS, MD, MN, MO (new), NC, NY, PA, SC, TX, VA & WI	\$24.95 per state \$79.95 for All-States

Prices subject to change.

## Contact Us

### 2nd Story Software, Inc.

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Cedar Rapids, IA 52402

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**Sales:** 1-800-573-4287

**Support:** (319) 373-4514

**Fax:** (319) 447-4674



## Low-Cost Electronic Filing

E-filing with TaxACT is available for all federal returns, income-taxing states that support e-filing and select 1065, 1120S & 1120 states\*. For a list of e-filing states, visit [prep.taxact.com/state-list](http://prep.taxact.com/state-list).

## Benefits of e-filing

- Save time with batch e-filing
- Clients receive their refund in as few as 8 days with direct deposit
- Get confirmation from the IRS that your clients' returns have been received
- E-file now & schedule an electronic payment any time before the tax filing deadline

TaxACT offers convenient per return and unlimited e-filing plans, as well as software + e-filing bundles. Pricing and details can be found at [prep.taxact.com/catalog](http://prep.taxact.com/catalog).

\* An Electronic Filing Identification Number (EFIN) is required to e-file with TaxACT products. Learn how to apply for an EFIN at [prep.taxact.com/catalog](http://prep.taxact.com/catalog). The IRS mandates that preparers filing more than 10 individual federal returns/year must e-file for the 2011 tax year.



## TaxACT TaxPayer Support® ..... \$19.95 per tax year

Do you have tax questions? We have the answers. Get unlimited phone and e-mail support from our tax specialists for the 2011 tax season. (Included in Enterprise Editions.)

### Tax year 2011 office hours (CST)

#### Off Season

M – F 8 a.m. – 5 p.m.

Sat. closed

Sun. closed

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### Tax Season (early Jan. through April filing deadline)

M – F 7 a.m. – 9 p.m.

Sat. 8 a.m. – 6 p.m.

Sun. 10 a.m. – 5 p.m.



## Preparer's 1040 Edition ..... \$119

For professionals who need robust tools to prepare and print an unlimited number of federal **1040 returns**, as well as time-saving, organization and accuracy tools.

- **Prepare & print an unlimited number of 1040 federal returns**
- **Up-to-date forms, schedules and worksheets**, including Forms 1040, 1040A and 2848, and Schedule C
- **Data imports to save you time and decrease errors** – import last year's TaxACT returns, PDFs of last year's returns prepared by some software (*see web site for supported software*) and investment data
- **Fast data entry features** – enter data directly into forms or use quick entry methods for W-2, 1099 & 4562 data
- **Low-cost integrated e-filing solutions** (*see page 4 for details*)
- **Client Manager** – keep client information organized & up-to-date
- **Bookmarks** – use to easily return to interview questions later
- **Powerful reports & calculators:**
  - Prior year comparison report
  - Separate vs. joint comparison
  - Depreciation reports
  - All-state tax estimation planning tool
  - College student financial aid report
  - "What if" estimates for various tax scenarios
  - Loan & savings calculators
  - Custom reports
- **Security logging** – track access and changes made to client returns
- **Instruction letters and templates** for invoices, billing by form and mailing labels
- **Data transfer** – your firm's data automatically flows into client returns
- **TaxACT Alerts** – identifies possible errors, omissions and tax-saving opportunities
- **Competitively priced ERCs & ERDs** – *see prep.taxact.com* for bank partner information



**Preparer's 1040 Enterprise Edition..... \$199**

Enjoy all 1040 Edition features and additional tools, including online data backup, TaxPayer Support, Appointment Manager and advanced security options for collaboration within your existing network.

**All features in the 1040 Edition, plus:**

- **Collaborate within your existing network** – centrally store and share client returns and data
- **Online data backup** – back up client returns to our secure servers for access through May 2015. Finish an existing 2011 return, print a backup copy and more!
- Unlimited phone & e-mail **TaxPayer Support**
- **Appointment Manager** – use this calendar to track client meetings & birthdays. Reminder alerts & ability to view by client.
- **ReturnSafe** – prevent others from changing returns you have open
- **Document Manager** – attach scanned documents to client returns



**Preparer's 1040 State ..... \$24.95 per state**

**1040 All-States (for all income taxing states) ..... \$79.95**

Prepare & print an unlimited number of state returns. TaxACT transfers clients' federal 1040 data into state forms so that you can finish state returns in minutes. Just answer a few questions & run TaxACT Alerts.

- **Available for all 44 states** that assess income taxes
- **Bookmarks** – use to easily return to interview questions later
- **Up-to-date forms, schedules & worksheets, including** all part-year resident & non-resident forms
- **Low-cost integrated e-filing solutions** *(see page 4 for details)*



## Preparer's 1065 Edition ..... \$119

For professionals who want to prepare and print an unlimited number of federal **Partnership returns**, and desire time-saving, organization and accuracy tools.

- **Prepare & print an unlimited number of 1065 federal returns**
- **Up-to-date forms and schedules**, including Forms 1065, 2848, 4562, 4797, 7004 and 8825
- **Allocate & update Schedule K-1s automatically** – even as business income changes
- **Data import** – import key data from 2010 TaxACT returns in one step
- **Fast data entry features** – enter data directly into forms or use the quick entry method
- **Low-cost integrated e-filing solutions** (*see page 4 for details*)
- **Client Manager** – keep client information organized & up-to-date
- **Bookmarks** – use to easily return to interview questions later
- **Powerful reports & calculators:**
  - Prior year comparison report
  - Depreciation reports
  - Loan & savings calculators
  - Custom reports
  - Partner Distributive Share Report
- **Security logging** – track access and changes made to client returns
- **Instruction letters & templates** for invoices, billing by form & mailing labels
- **Data transfer** – your firm's data automatically flows into client returns
- **TaxACT Alerts** – identifies possible errors, omissions and tax-saving opportunities



**Preparer's 1065 Enterprise Edition..... \$199**

Enjoy all 1065 Edition features and additional tools, including online data backup, TaxPayer Support, Appointment Manager and advanced security options for collaboration within your existing network.

**All features in the 1065 Edition, plus:**

- **Collaborate within your existing network** – centrally store and share client returns and data
- **Online data backup** – back up client returns to our secure servers for access through May 2015. Finish an existing 2011 return, print a backup copy and more!
- Unlimited phone & e-mail **TaxPayer Support**
- **Appointment Manager** – use this calendar to track client meetings & birthdays. Reminder alerts & ability to view by client.
- **ReturnSafe** – prevent others from changing returns you have open
- **Document Manager** – attach scanned documents to client returns
- **Instruction letters & templates** for invoices, billing by form & mailing labels – including K-1 Basis Worksheet



**Preparer's 1065 State .....\$24.95 per state**

**1065 All-States (includes all states below) .....\$79.95**

Prepare & print an unlimited number of state returns. TaxACT transfers clients' federal 1065 data into state forms so that you can finish state returns in minutes. Just answer a few questions & run TaxACT Alerts.

**• Available for the following states:**

- |            |                                |
|------------|--------------------------------|
| Arizona    | Missouri                       |
| California | New Jersey                     |
| Florida    | New York (includes city forms) |
| Georgia    | North Carolina                 |
| Illinois   | Pennsylvania                   |
| Indiana    | South Carolina                 |
| Iowa       | Texas                          |
| Kansas     | Virginia                       |
| Maryland   | Wisconsin                      |
| Minnesota  |                                |

- **Bookmarks** – use to easily return to interview questions later
- **1065 State e-filing** available for CA, FL, GA (**new**), KS, MD (**new**), NY (including NY City) and WI (*see page 4 for details*)



## Preparer's 1120S Edition ..... \$119

For professionals who want to prepare and print an unlimited number of federal **S-Corporation returns**, and desire time-saving, organization and accuracy tools.

- **Prepare & print an unlimited number of 1120S federal returns**
- **Up-to-date forms and schedules**, including Forms 1120S, 2848, 4562, 4797, 7004 and 8825
- **Allocate & update Schedule K-1s automatically** – even as business income changes
- **Data import** – import key data from 2010 TaxACT returns in one step
- **Fast data entry features** – enter data directly into forms or use the quick entry method
- **Low-cost integrated e-filing solutions** (*see page 4 for details*)
- **Client Manager** – keep client information organized & up-to-date
- **Bookmarks** – use to easily return to interview questions later
- **Powerful reports & calculators:**
  - Prior year comparison report
  - Depreciation reports
  - Loan & savings calculators
  - Custom reports
  - Shareholder Distributive Share Report
- **Security logging** – track access and changes made to client returns
- **Instruction letters & templates** for invoices, billing by form & mailing labels
- **Data transfer** – your firm's data automatically flows into client returns
- **TaxACT Alerts** – identifies possible errors, omissions and tax-saving opportunities



**Preparer's 1120S Enterprise Edition ..... \$199**

Enjoy all 1120S Edition features and additional tools, including online data backup, TaxPayer Support, Appointment Manager and advanced security options for collaboration within your existing network.

**All features in the 1120S Edition, plus:**

- **Collaborate within your existing network** – centrally store and share client returns and data
- **Online data backup** – back up client returns to our secure servers for access through May 2015. Finish an existing 2011 return, print a backup copy and more!
- Unlimited phone & e-mail **TaxPayer Support**
- **Appointment Manager** – use this calendar to track client meetings & birthdays. Reminder alerts & ability to view by client.
- **ReturnSafe** – prevent others from changing returns you have open
- **Document Manager** – attach scanned documents to client returns
- **Instruction letters & templates** for invoices, billing by form & mailing labels – including K-1 Basis Worksheet



**Preparer's 1120S State ..... \$24.95 per state**

**1120S All-States (includes all states below) ..... \$79.95**

Prepare & print an unlimited number of state returns. TaxACT transfers clients' federal 1120S data into state forms so that you can finish state returns in minutes. Just answer a few questions & run TaxACT Alerts.

**• Available for the following states:**

- |            |                                |
|------------|--------------------------------|
| Arizona    | Missouri                       |
| California | New Jersey                     |
| Florida    | New York (includes city forms) |
| Georgia    | North Carolina                 |
| Illinois   | Pennsylvania                   |
| Indiana    | South Carolina                 |
| Iowa       | Texas                          |
| Kansas     | Virginia                       |
| Maryland   | Wisconsin                      |
| Minnesota  |                                |

- **Bookmarks** – use to easily return to interview questions later
- **1120S State e-filing** available for CA, FL, GA (**new**), KS, MD (**new**), NY (including NY City) and WI (*see page 4 for details*)



## Preparer's 1120 Edition ..... \$119

For professionals who want to prepare and print an unlimited number of federal **C-Corporation returns**, and desire time-saving, organization and accuracy tools.

- **Prepare & print an unlimited number of 1120 federal returns**
- **Up-to-date forms and schedules**, including Forms 1120, 2220, 2848, 4562, 4797 and 7004
- **Data import** – import key data from 2010 TaxACT returns in one step
- **Fast data entry features** – enter data directly into forms or use the quick entry method
- **Low-cost integrated e-filing solutions** *(see page 4 for details)*
- **Client Manager** – keep client information organized & up-to-date
- **Bookmarks** – use to easily return to interview questions later
- **Powerful reports & calculators:**
  - Prior year comparison report
  - Depreciation reports
  - Loan & savings calculators
  - Custom reports
- **Security logging** – track access and changes made to client returns
- **Instruction letters and templates** for invoices, billing by form and mailing labels
- **Data transfer** – your firm's data automatically flows into client returns
- **TaxACT Alerts** – identifies possible errors, omissions and tax-saving opportunities



**Preparer's 1120 Enterprise Edition..... \$199**

Enjoy all 1120 Edition features and additional tools, including online data backup, TaxPayer Support, Appointment Manager and advanced security options for collaboration within your existing network.

**All features in the 1120 Edition, plus:**

- **Collaborate within your existing network** – centrally store and share client returns and data
- **Online data backup** – back up client returns to our secure servers for access through May 2015. Finish an existing 2011 return, print a backup copy and more!
- Unlimited phone & e-mail **TaxPayer Support**
- **Appointment Manager** – use this calendar to track client meetings & birthdays. Reminder alerts & ability to view by client.
- **ReturnSafe** – prevent others from changing returns you have open
- **Document Manager** – attach scanned documents to client returns



**Preparer's 1120 State..... \$24.95 per state**

**1120 All-States (includes all states below) ..... \$79.95**

Prepare & print an unlimited number of state returns. TaxACT transfers clients' federal 1120 data into state forms so that you can finish state returns in minutes. Just answer a few questions & run TaxACT Alerts.

**Available for the following states:**

- |               |                                |
|---------------|--------------------------------|
| Arizona (new) | Minnesota                      |
| California    | Missouri (new)                 |
| Florida       | New York (includes city forms) |
| Georgia       | North Carolina                 |
| Illinois      | Pennsylvania                   |
| Indiana       | South Carolina                 |
| Iowa (new)    | Texas                          |
| Kansas        | Virginia                       |
| Maryland      | Wisconsin                      |

- **Bookmarks** – use to easily return to interview questions later
- **1120 State e-filing** available for CA, FL, GA (new), IL (new), KS, MD (new), NY (includes NY City) and WI (see page 4 for details)

## Save Money! TaxACT 2011 Preparer's Bundles



### 1040 Bundle.....\$559

- Preparer's 1040 Edition *(over \$695 value)*
- Preparer's 1040 All-States
- Unlimited federal e-filing
- Unlimited state e-filing



### 1040 Enterprise Bundle .....\$619

- Preparer's 1040 Enterprise Edition *(over \$775 value)*
- Preparer's 1040 All-States
- Unlimited federal e-filing
- Unlimited state e-filing



### Business Bundle.....\$479

- Preparer's 1065 Edition *(over \$595 value)*
- Preparer's 1065 All-States
- Preparer's 1120S Edition
- Preparer's 1120S All-States
- Preparer's 1120 Edition
- Preparer's 1120 All-States



### Enterprise Business Bundle .....\$669

- Preparer's 1065 Enterprise Edition *(over \$835 value)*
- Preparer's 1065 All-States
- Preparer's 1120S Enterprise Edition
- Preparer's 1120S All-States
- Preparer's 1120 Enterprise Edition
- Preparer's 1120 All-States



**Business 3-pack..... \$279**

- Preparer's 1065 Edition *(over \$355 value)*
- Preparer's 1120S Edition
- Preparer's 1120 Edition



**Enterprise Business 3-pack..... \$479**

- Preparer's 1065 Enterprise Edition *(over \$595 value)*
- Preparer's 1120S Enterprise Edition
- Preparer's 1120 Enterprise Edition



**Business 2-pack..... \$199**

- Choose 2 of the following:** *(over \$235 value)*
- Preparer's 1065 Edition
  - Preparer's 1120S Edition
  - Preparer's 1120 Edition



**Enterprise Business 2-pack..... \$339**

- Choose 2 of the following:** *(over \$395 value)*
- Preparer's 1065 Enterprise Edition
  - Preparer's 1120S Enterprise Edition
  - Preparer's 1120 Enterprise Edition



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