

Company Fast Facts

TaxAct is a leading provider of affordable digital and download tax preparation solutions for individuals, business owners and professional preparers. The company offers a comprehensive suite of online, download and mobile solutions for tax preparers with practices of all sizes.

TaxAct was founded in 1998 by four tax software industry veterans who assembled a management team with significant experience in tax accounting, marketing and software development. A pioneer in the industry for more than 17 years, TaxAct has assisted with more than 60 million e-filed federal returns since 2000.

Please send any media inquiries to pr@taxact.com and we will direct your request to the appropriate TaxAct personnel. To review recent TaxAct press releases, visit taxact.com/press.

Company History

- 1998** Company was founded as 2nd Story Software by Lance Dunn, Cammie Greif, Jerry McConnell and Alan Sperfslage.
- 2000** Preparer's Editions introduced for tax professionals.
- 2004** Investment interest sparks \$89 million capital investment.
- 2012** Acquired by Blucora (NASDAQ: BCOR).
- 2013** Acquires Balance Financial and 2nd Story Software becomes TaxAct; changes signify TaxAct's commitment to providing customers with both tax and financial solutions.
- 2015** TaxAct expands its footprint internationally with the acquisition of SimpleTax in Canada.

TaxAct at a Glance

- TaxAct has been providing software for professional tax return preparers, individuals and small business owners for more than 18 years.
- The company's mission is to empower people to navigate the complexities of tax and finance with ease and accuracy at a fair price.
- Since 2000, TaxAct has assisted with about 60 million e-filed federal returns.
- TaxAct has had 16 years of consecutive revenue growth.

TaxAct Preparer's Editions

Thousands of professional tax return preparers use TaxAct Preparer's Editions to streamline workflows so they can complete more client returns in less time. Tax professionals save money by paying only for what they need with the flexible price and packaging options available from TaxAct.

Easy to install and use, TaxAct 2015 Preparer's Editions include time-saving imports for last year returns, investments, trial balance reports and Form W-2s. In addition, professionals can use quick entry for Forms W-2, 1099 and 4562. TaxAct supports automatic Schedule K-1 allocation and imports as well. Preparers using TaxAct have the option of entering data directly into tax forms, utilizing the Q&A interview method, or easily toggling between the two data entry methods.

Powerful and reliable, TaxAct Preparer's Editions provide timely tax law updates, compliance resources and customizable invoices, organizers and instruction letters. TaxAct Professional customers also have instant access to tips, strategies and explanations for credits, deductions and tax law changes via TaxTutor Guidance.

New Features and Benefits for Tax Year 2015

- **Dedicated customer care** – dedicated customer support for all TaxAct professional customers at no additional fee.
- **Practice Manager** – a cloud-based account management hub that gives professionals one convenient place to securely access products, features and practice information.
- **Preparer's 990 Federal Editions** – TaxAct now offers Federal Form 990 Editions for the annual information return required for some tax-exempt, charitable organizations.
- **Support for all business states** – all 1065, 1120 and 1120S states, giving professionals a complete suite of federal and state business products.
- **More 1041 States** – several new State Editions added, bringing the total number of supported Form 1041 states to nearly 30.

Additional features and enhancements will be released with Final Versions available in early January. For a comprehensive overview of TaxAct Preparer's Editions, please visit prep.taxact.com.

Release Dates

- Oct. 2015** Preview versions of Federal Editions release.
- Jan. 2016** Final versions of Federal Editions release, State Editions release as forms become available.
- Jan. 2016** Orders for TaxAct 2016 Preparer's Editions accepted. Early bird pricing offered for a limited time.

30-Day Money-Back Guarantee

If TaxAct Professional customers are not completely satisfied with their TaxAct Preparer's software they can simply return it within 30 days of receipt for a full refund (excluding shipping and handling costs). No questions asked.

