

# Professionals Who Can Benefit From Tax Software

## 1. Why Tax Preparation Is a Wider Field Than It Looks

Anyone preparing federal returns for pay needs a PTIN, including Enrolled Agents, independent preparers, and bookkeepers, not just CPAs. Professional tax software equips all of them with multi-state form libraries, calculations, and diagnostic engines used by high-volume offices.

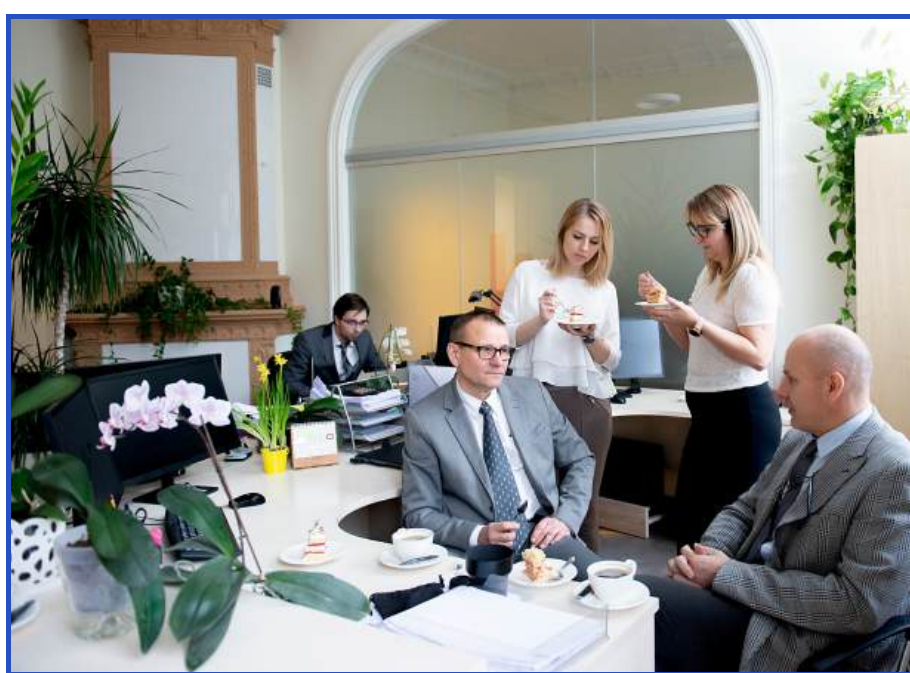


## 2. Enrolled Agents: Credentialed for Depth and Representation

Enrolled Agents hold a federally recognized IRS credential covering individual tax law, business tax law, and audit representation. They need platforms with multi-entity support — 1040s, 1065s, and 1120s — and built-in compliance tools that update automatically mid-season.

## 3. Independent Preparers and Service Bureau Operators

Independent preparers need interview-style entry and error checking to manage high volumes during peak season. Multi-site bureau owners need centralized tools and multi-user access. Both benefit from bank product integration that keeps clients from walking away.

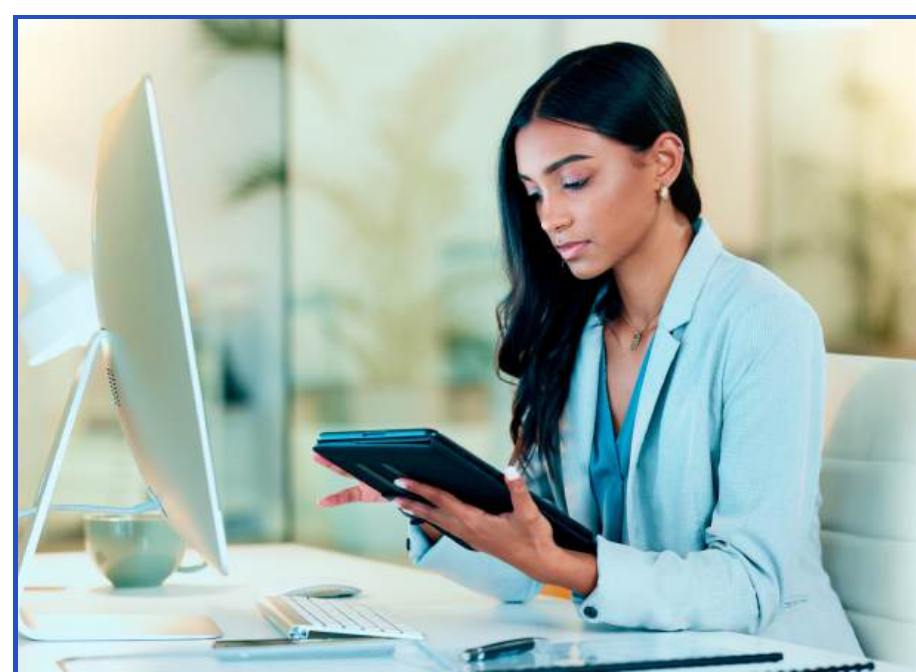


## 4. Bookkeepers and Insurance Agents Expanding Their Services

Bookkeepers already track income, reconcile accounts, and know their clients' financials year-round. Adding tax preparation prevents clients from taking reconciled books to an outside firm and adds an immediate high-margin revenue line without requiring a new client base.

## 5. The Features That Matter Most for Non-CPA Preparers

Secure client portals protect data and collect e-signatures. Automated IRS compliance keeps filings current as tax law changes. Built-in bank products eliminate extra vendors. Multi-entity support handles 1040s, 1065s, and 1120s for small businesses and partnerships.



## 6. The Right Software Grows With Your Practice

Whether you prepare 40 returns or 400, the core needs are the same, accuracy, efficiency, reliable support, and a platform current with IRS changes year-round. Starting with solid software ensures you don't overpay for unneeded features as your practice grows.

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