

Tax Software Survey for 2020

Tax Software Prices

The prices listed below are based on information found on the providers' websites in November 2020. They have not been independently reviewed or verified, and are provided only as a point of comparison for readers of the Annual Tax Software Survey.

TAX PREPARATION SOFTWARE PRICES

ATX

- Individual (ATX 1040 Package): \$719; includes;
 - 2 Concurrent User Licenses
 - All Federal 1040 Forms
 - Up to 3 Individual 1040 States
 - 75 E-File Returns Included
 - Free Software Conversions
 - Knowledgebase & Blog Access

- ATX pay per return: \$597 this offer includes;
 - Individual Returns
 - Business Returns
 - Payroll Returns

- Entities:
 1. MAX Package: \$1,690/one-time payment and it includes:
 - 3 Concurrent User Licenses
 - All Federal and State Individual Forms
 - All Business Federal, State, Specialty Forms
 - Free Unlimited E-File Returns
 - Payroll Compliance Reporting
 - Sales & Use Tax Forms
 - Free Software Conversions
 - CCH U.S. Master Tax Guide

 2. Total Tax Office Package: \$2,729/one-time payment this offer includes:
 - 5 Concurrent User Licenses
 - All Federal and State Individual Forms
 - All Business Federal, State, Specialty Forms
 - Free Unlimited E-File Returns
 - Payroll Compliance Reporting
 - Sales & Use Tax Forms
 - PaperlessPLUS document management and workflow
 - Free Software Conversions
 - CCH U.S. Master Tax Guide
 - Practical Tax Expert Pro
 - Practice Aids & Productivity Tools

3. ATX Advantage Package: \$4,485/one-time payment this offer includes:
- 6 Concurrent User Licenses
 - All Federal and State Individual Forms
 - All Business Federal, State, Specialty Forms
 - Enhanced Asset Management Capabilities
 - Advanced Tax Calculations & Compliance Capabilities
 - Free Unlimited E-File Returns
 - Payroll Compliance Reporting
 - Sales & Use Tax Forms
 - PaperlessPLUS
 - Product Offers & Discounts
 - Free Software Conversions
 - CCH U.S. Master Tax Guide
 - Practical Tax Expert Pro
 - Practice Aids & Productivity Tools

Source: <https://taxna.wolterskluwer.com/professional-tax-software/atx#pricing>

CCH Access Tax

- Individual: no pricing information available
- Entities: no pricing information available
- *Contact Wolters Kluwer to obtain pricing information*

CCH ProSystem fx

- Individual: no pricing information available
- Entities: no pricing information available
- *Contact Wolters Kluwer to obtain pricing information*

Drake Software

- Individual:
 1. Per Return: \$330 for 15 returns plus \$22 for additional returns
 2. Unlimited returns: \$1,595; early renewal discount available
- Entities:
 1. Per Return: \$330 for 15 returns plus \$22 for additional returns
 2. Unlimited returns: \$1,595; early renewal discount available

Source: <https://www.drakesoftware.com/products/buy-or-renew-drake/>

GoSystem Tax RS

- Individual: No pricing information available
- Entities: No pricing information available
- *Contact Thomson Reuters to obtain pricing information*

Intuit ProSeries

- Proseries Basic
 - Basic 20: \$450 per year (Number of 1040s: 20) 1 state
 - Basic 50: \$769 per year (Number of 1040s: 50) 2 states

- Basic Unlimited: \$1,130 (Unlimited 1040s) 4 states
- ProSeries Professional
 - Pay-per-return license: \$340 per year access to all federal and state forms; \$45 per return
 - 1040 Complete: \$1,900, unlimited 1040 returns for all states.

Source: <https://proconnect.intuit.com/proseries/pricing-main/>

Intuit ProConnect Tax Online

- Individual: Pricing per return, different pricing based on number of returns
 - \$47.23 per return, decreases with more volume
- Business: Pricing per return, different pricing based on number of returns
 - \$58.98 per return, decreases with more volume

Source: <https://proconnect.intuit.com/tax-online/pricing/>

Lacerte Tax

- Individual: Lacerte Unlimited and Lacerte 200: pricing is based on customized solution.
- Pay-per-return License: \$426 plus \$81 per return (federal plus one state)

Source: <https://proconnect.intuit.com/lacerte/pricing-main/>

TaxACT

- Individual:
 - 1040 Bundle: \$670 for unlimited 1040 federal and state returns, unlimited e-file
 - Enterprise bundle: \$210 per type (1040, 1120, etc), allows for multiple users
- Entity:
 - Complete bundle: \$1,250 for unlimited individual / entity state and federal returns
 - Complete enterprise bundle: \$1,600 (allows for multiple users)

Source: <https://www.taxact.com/professional/products/bundles>

TaxSlayer Pro

- Classic version: \$1,195
- Pro Web (cloud-based) version: \$1,395

Source: <https://www.taxslayerpro.com/buy-our-professional-tax-software>

TaxWise

- Pay-per-return: \$599 (individual & entity returns; no indication of cost per return)
- ProFiling: \$1,199 (individual returns only)
- Power: \$2,739 (individual & entity returns)

Source: <https://taxna.wolterskluwer.com/professional-tax-software/taxwise#packages>

Ultra Tax CS

- Comprehensive UltraTax CS: price varies by plan
- UltraTax CS Express 100: \$2,500 per year
 - Single user access, up to 100 individual returns and 25 business returns

Source: <https://tax.thomsonreuters.com/us/en/cs-professional-suite/ultratax-cs>

TAX RESEARCH SOFTWARE

Bloomberg BNA

- *Contact Bloomberg for pricing information*

CCH AnswerConnect

- 5 package options
- *Contact Wolters Kluwer to obtain pricing information*

CCH IntelliConnect

- *Contact Wolters Kluwer to obtain pricing information*

Checkpoint

- *Contact Thomson Reuters to obtain pricing information*

LexisNexis

- *Contact LexisNexis to obtain pricing information*

Parker Tax Publishing

- Parker Tax Pro Library: special sales price of \$304, regular price \$404

Source: <https://www.parkertaxpublishing.com/Brochure-02.aspx>

The Tax Book

- What's New Package: \$89
- Jacob Special: \$349
- TTB Bundle: \$449

Source: <https://www.thetaxbook.com/products.asp>

TaxNotes

- *Contact TaxNotes to obtain pricing information*