



YOUR TAX PREPARATION PARTNER

## COMPANY OVERVIEW

SurePrep was the first to develop web-based workflow optimizing systems specifically for the tax profession, and its services continue to help firms increase their efficiency, productivity and profits. Founded by a CPA, SurePrep's automated digital workpaper solutions, forms recognition, automatic return population functions and outsourcing options are used by nearly half of the top 100 accounting firms in the country.

One of the keys to SurePrep's success has been its continued development and enhancement of its products and services to meet the constantly changing needs of the profession, from helping get the most out of new workflow processes to going completely paperless. The company's outsourcing options help practices increase clients without increasing workload or staff, and include U.S.-based, on-shore preparation, having grown to accommodate increased demand, while continuing to provide secure return processing and bookmarked PDF workpapers organized in preparation and review-ready format.

**1040SCAN**  
Automating Tax Preparation



With SurePrep's solutions, tax and accounting practices are given the ability to work smarter, not harder, increasing productivity and profitability, while promoting fully digital document retention. SurePrep is committed to continuing its mission of developing solutions that aid the tax and accounting profession.

## PRODUCTS & SERVICES

**1040SCAN & 1041SCAN** – The web-based 1040SCAN and new 1041SCAN eliminate nearly all manual data entry for common client tax forms, including W-2s, 1099s, brokerage statements and more. Forms are recognized by the system, then organized into electronic client binders that contain all of the data and organized documents as needed for preparation and review processes.

The workpapers include organized and bookmarked PDF files, which aid in the move to a paperless workflow and document retention. Data is then automatically pulled from the binders and populated into the professional's tax software system. As the first program to offer these capabilities, 1040SCAN was recognized with a Tax & Accounting Technology Innovation Award in 2007. As evidence of its popularity, professionals are using SurePrep for more returns than ever among firms dedicated to optimizing their workflow. TY2008 saw a more than doubling of the number of returns processed by the system. Along with the ability to manage 1041s, SurePrep also added advanced functions for merging bookmarked data.

## ▶ Tax Outsourcing Options

The methods used by SurePrep enable tax and accounting practices to be able to greatly expand their

client base without having to increase staff or work longer hours during tax season. By being able to access hundreds of tax professionals that can manage some or most of preparation tasks during busy season, professionals can spend less time with administrative tasks and more time providing more profitable services.

With the full version of SurePrep Outsource, SurePrep's staff handles data entry and compiles client DreamWorkpapers, a bookmarked PDF file that can sync data into preparation programs, and also speed and streamline review processes by enabling the professional to drilldown to source documents from leadsheets when reconciling return data. The professional firm decides how many and which returns to have processed via this method, along with the option to utilize SurePrep's completely U.S.-based staff of nearly 200 tax pros. This on-shore option now makes up more than 60 percent of SurePrep's outsourcing services. With Outsource Lite, firms can take advantage of many of these



## Benefits of Outsourcing with SurePrep:

- ▶ Options to use on-shore or off-shore professionals
- ▶ Cost savings – up to 50% less than processing in-house
- ▶ Reduced tax season stress = better work environment for employees
- ▶ Faster turnaround for clients
- ▶ Ability to “ramp up” during tax season without staffing and training issues
- ▶ Access to more experienced staff than available locally



