

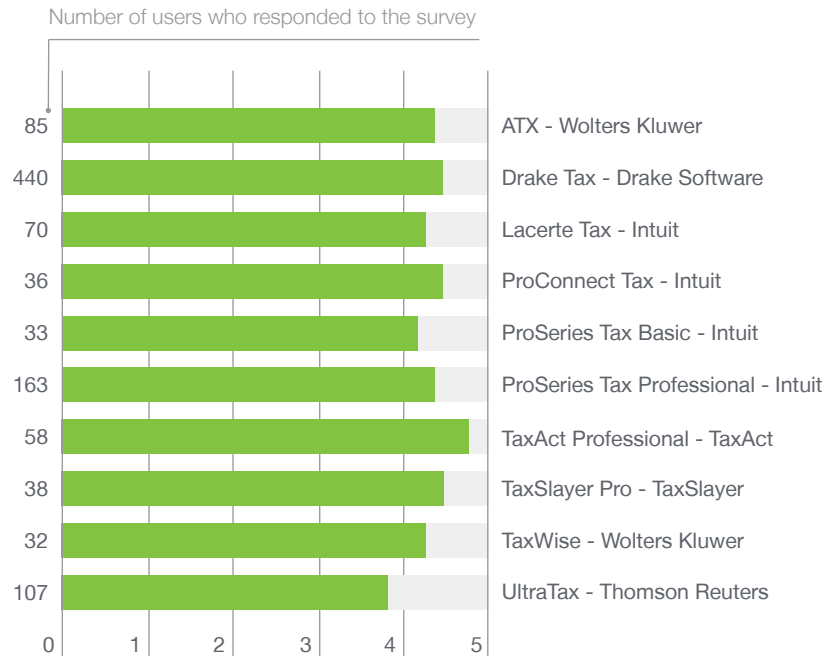
# NATP™ 2023 Software Survey Results



# Overall Satisfaction

Respondents were asked to rate their satisfaction on a scale of 1-5, where 1 is very dissatisfied and 5 is very satisfied.

Overall satisfaction takes into consideration multiple aspects of the software including price, ease of use, accuracy and customer service.

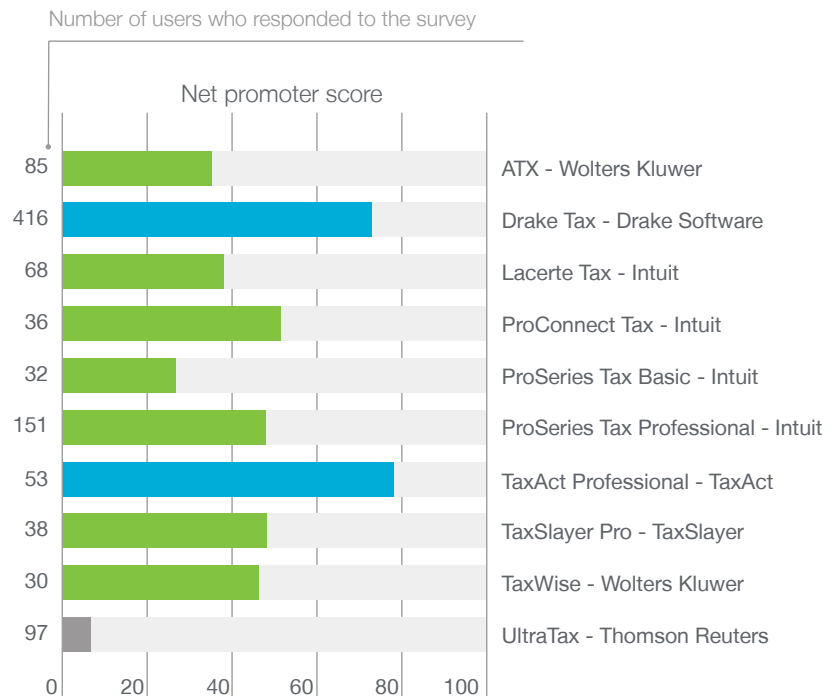


## Likelihood to Recommend Software Program to Another Tax Professional

The net promoter score uses a scale of 0-10, where 0 is an unhappy customer and 10 is a happy/loyal customer. The score is determined by subtracting the percent of customers who are detractors (0-6) from the percent of promoters (9-10).

An overall score of 0-20 is good; a score of 21-49 is favorable; a score of 50-79 is excellent; and a score of 80+ is world class.

- Good (0-20)
- Favorable (21-49)
- Excellent (50-79)
- World Class (80+)



### Drake Tax

Drake Tax is the flagship tax preparation solution from Drake Software. Drake Tax is loaded with efficiency features that streamline the tax preparation workflow for firms of all sizes. Backed by robust onboarding and award-winning support, Drake Tax is the software of choice for over 70,000 tax firms.

DrakeSoftware



## The most important factor for individuals who use the following software:



**46%** indicated reliability as the most important factor when selecting software.

ATX - Wolters Kluwer	Ease of use
Drake Tax - Drake Software	Reliability
Lacerte Tax - Intuit	Reliability
ProConnect Tax - Intuit	Ease of use
ProSeries Tax Basic - Intuit	Ease of use
ProSeries Tax Professional - Intuit	Reliability
TaxAct Professional - TaxAct	Reliability
TaxSlayer Pro - TaxSlayer	Reliability
TaxWise - Wolters Kluwer	Reliability
Ultra Tax - Thomson Reuters	Reliability

## Top 3

The top three features, in order of importance, individuals are most likely to compare when selecting a software:

1. Additional forms included with 1040 (i.e., 1120, 1120-S, 990, 706, 1099 series)
2. Federal tax updates
3. Software input format (i.e., form-based, interview-based, etc.)

## Compatibility/Reliability

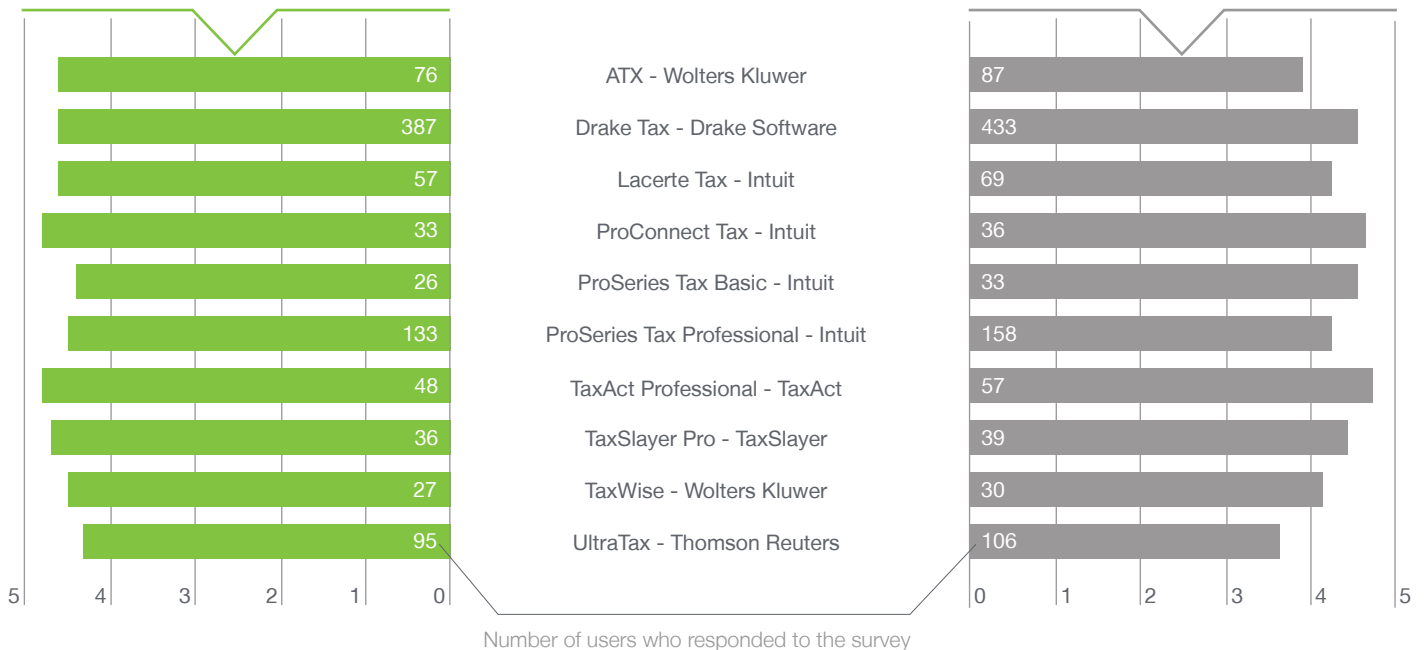
Respondents were asked to rate their satisfaction on a scale of 1-5 with 1 being very dissatisfied and 5 being very satisfied.



Software compatibility with your network



Reliability of software with regards to system bugs, errors, crashes, etc.

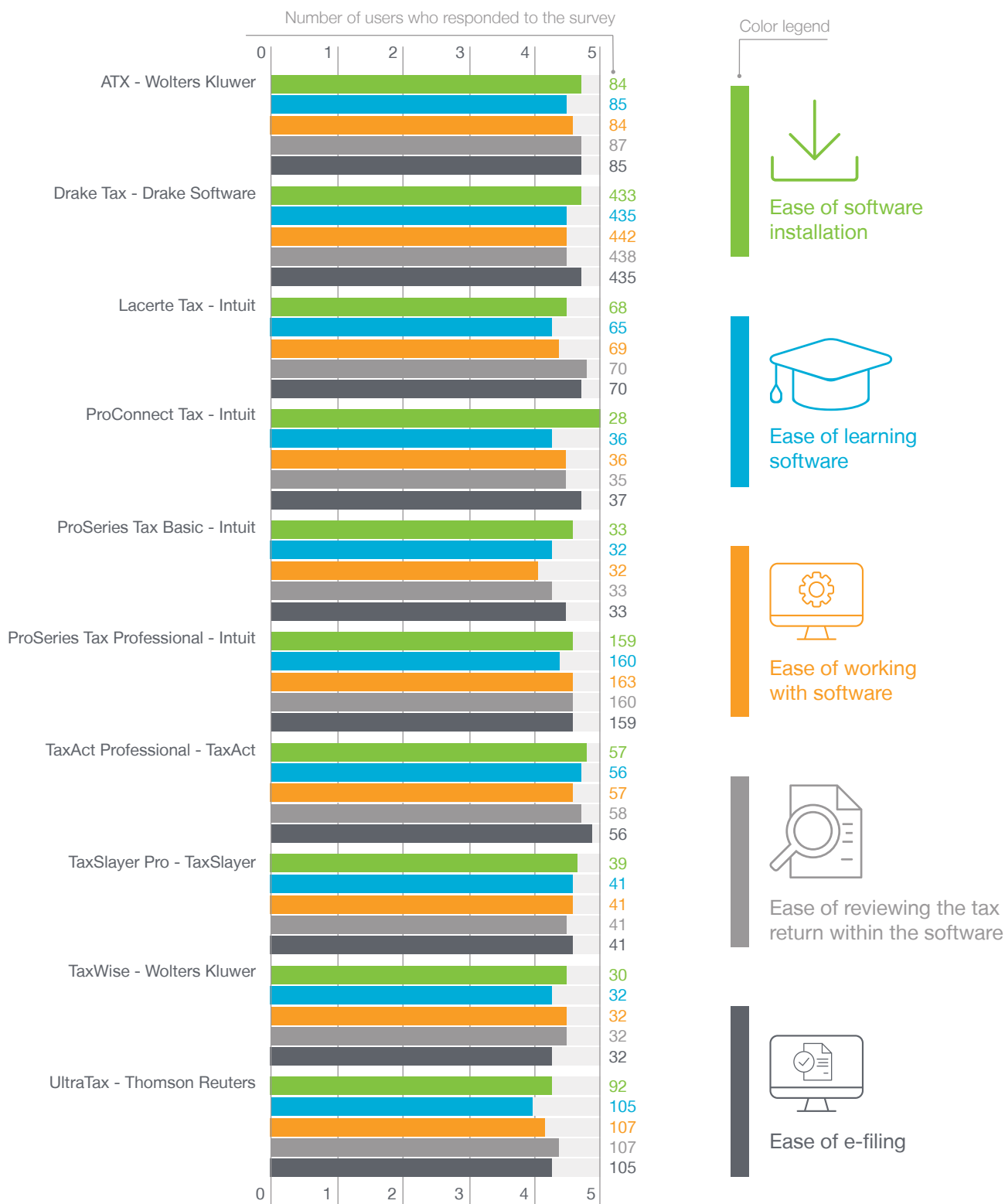


### Lacerte Tax

Lacerte was created by tax accountants for tax accountants. Firms like yours have relied on Lacerte for over 40 years to support multiple preparers with the most robust tools that enable them to handle even the most complex returns with confidence.

## Usability

Respondents were asked to rate their satisfaction on a scale of 1-5 with 1 being very dissatisfied and 5 being very satisfied.



## ProConnect Tax Online

ProConnect is a feature-rich, cloud-based tax software that will streamline and automate your firm's workflow. With professional tools that all work together, it's never been easier or more secure to connect your books-to-tax-to-advisory workflow from end to end.

## Software Updates

Respondents were asked to rate their satisfaction on a scale of 1-5 with 1 being very dissatisfied and 5 being very satisfied.

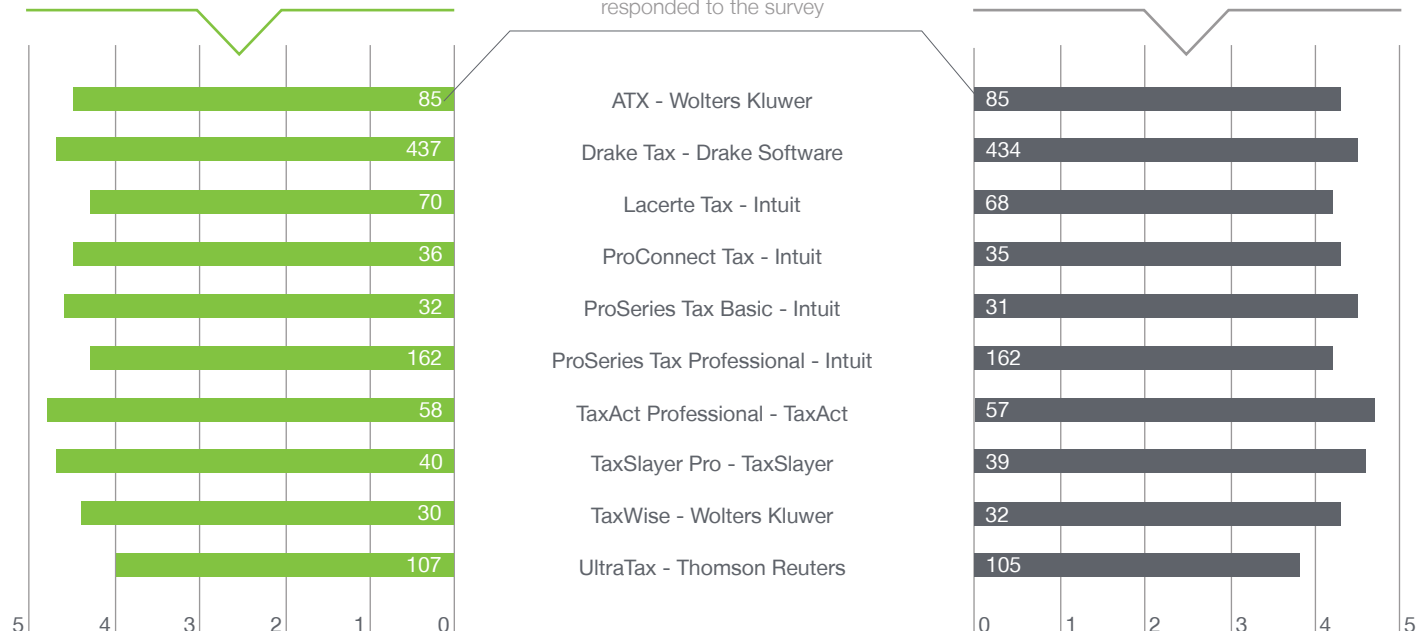


Timely software updates  
after **federal** tax law  
changes/updates



Timely software  
updates after **state**  
law changes/updates

Number of users who  
responded to the survey



## Software Details

	Offers a package to convert data from other vendors' 1040 software	Offers a cloud-based (online) preparation	Desktop-based software offers a mobile app option	Accounting software integrations	Form-based (navigating forms by direct clicks within form)	Interview-based (pre-determined questions to identify necessary forms)	Input sheet (navigating by subject/topic)
Drake Tax - Drake Software	X	X		X	X	X	X
Lacerte Tax - Intuit	X	X					X
ProConnect Tax - Intuit	X	X		X			X
ProSeries Tax Basic - Intuit	X				X		
ProSeries Tax Professional - Intuit	X	X			X		X
TaxAct Professional - TaxAct	X				X	X	
TaxSlayer Pro - TaxSlayer	X	X	X		X	X	X
TaxWise - Wolters Kluwer	X	X	X	X	X	X	X

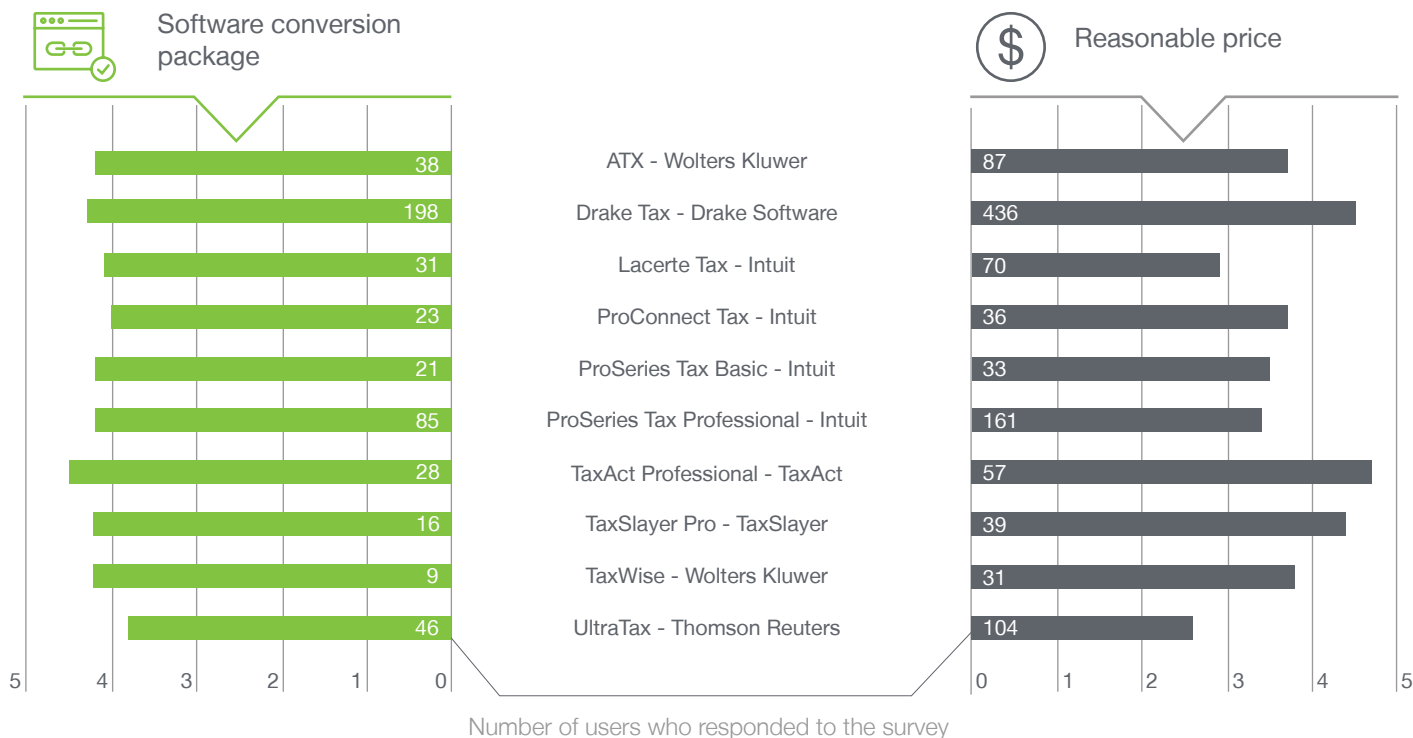
\*Please contact the company for more information as not all information was available for each company.

### ProSeries Professional

ProSeries professional tax software helps you prepare returns efficiently and is known for its ease of use, with forms-based input and transparent calculations, so you can work assured that your clients' returns are done right the first time.

## Product Satisfaction

Respondents were asked to rate their satisfaction on a scale of 1-5 with 1 being very dissatisfied and 5 being very satisfied.



## Pricing

		The 1099 series is included in the price of the basic 1040 package	There are licensing agreement restrictions	There is an additional fee for electronically filing a federal return
Drake Tax - Drake Software	<a href="#">Pricing website</a>	x		
Lacerte Tax - Intuit	<a href="#">Pricing website</a>		x	
ProConnect Tax - Intuit	<a href="#">Pricing website</a>			
ProSeries Tax Basic - Intuit	<a href="#">Pricing website</a>		x	
ProSeries Tax Professional - Intuit	<a href="#">Pricing website</a>		x	
TaxAct Professional - TaxAct	<a href="#">Pricing website for single users</a> <a href="#">Pricing website for bundles</a>		x	x
TaxSlayer Pro - TaxSlayer	<a href="#">Pricing website</a>			
TaxWise - Wolters Kluwer	<a href="#">Pricing website</a>			

\*Information was not available for all companies listed. Please check the company's website or call for more information.

### TaxWise

TaxWise® provides tax preparers with the industry's leading professional tax preparation software that helps you maximize productivity, revenue and efficiency so you can focus on your clients and growing your tax business. Whether you prepare individual 1040 or business tax returns, or are a new tax preparer, an experienced tax preparer or a service bureau, TaxWise has the tools and resources to help you prepare and file more U.S. tax returns in less time anywhere, anytime, with our Virtual Tax Office.





## Support

Respondents were asked to rate their satisfaction on a scale of 1-5 with 1 being very dissatisfied and 5 being very satisfied.

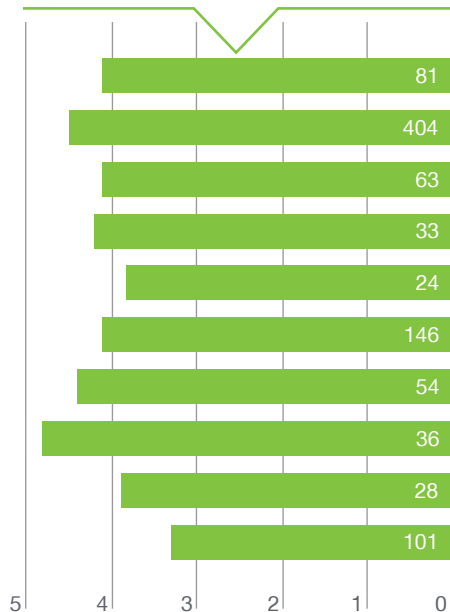


### Customer service from software company

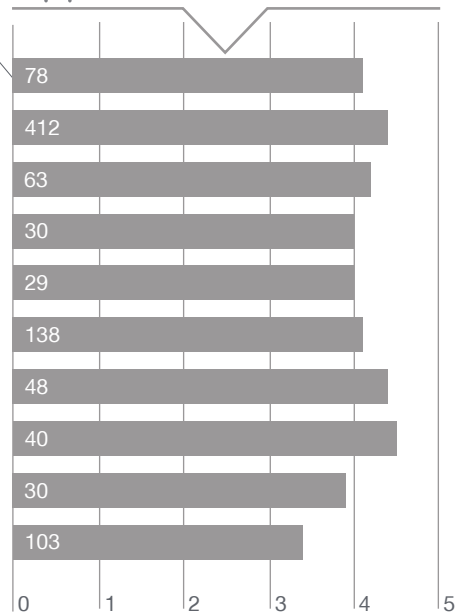


### Technical support from software company

Number of users who responded to the survey



ATX - Wolters Kluwer  
Drake Tax - Drake Software  
Lacerte Tax - Intuit  
ProConnect Tax - Intuit  
ProSeries Tax Basic - Intuit  
ProSeries Tax Professional - Intuit  
TaxAct Professional - TaxAct  
TaxSlayer Pro - TaxSlayer  
TaxWise - Wolters Kluwer  
UltraTax - Thomson Reuters



## Accuracy

Respondents were asked to rate their satisfaction on a scale of 1-5 with 1 being very dissatisfied and 5 being very satisfied.

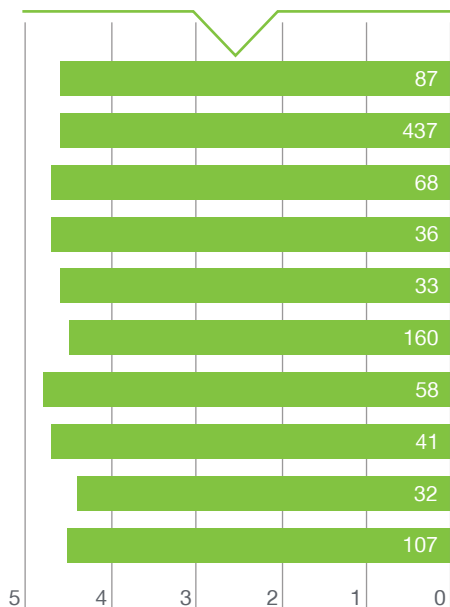


### Accuracy of software in regards to federal tax law

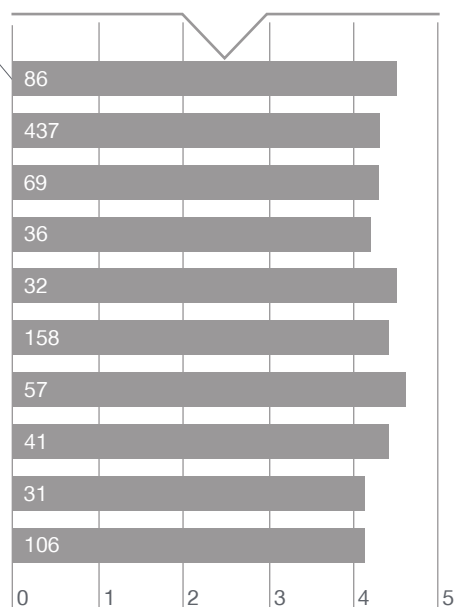


### Accuracy of software in regards to state law

Number of users who responded to the survey



ATX - Wolters Kluwer  
Drake Tax - Drake Software  
Lacerte Tax - Intuit  
ProConnect Tax - Intuit  
ProSeries Tax Basic - Intuit  
ProSeries Tax Professional - Intuit  
TaxAct Professional - TaxAct  
TaxSlayer Pro - TaxSlayer  
TaxWise - Wolters Kluwer  
UltraTax - Thomson Reuters



### TaxAct Professional

Powerful, professional tax software at a price you'll love, with a support team who cares. After 23 years in the business and successfully processing over 40 million e-files, we are proud to be the low-priced leader in professional tax software, while still offering scalable software and professional tax filing options for all practices.

**TaxAct**  
Professional

## Company Information



### Customer service hours

	During tax season (EST)		Outside of tax season
	Monday-Friday	Saturday	Monday-Friday
ATX - Wolters Kluwer	9 a.m. - 8 p.m.		
Drake Tax - Drake Software	8 a.m. - 10 p.m.	8 a.m. - 6 p.m.	
Lacerte Tax - Intuit	9 a.m. - 8 p.m.		9 a.m. - 8 p.m.
ProConnect Tax - Intuit	9 a.m. - 8 p.m.		9 a.m. - 8 p.m.
ProSeries Tax Basic - Intuit	9 a.m. - 8 p.m.		9 a.m. - 8 p.m.
ProSeries Tax Professional - Intuit	9 a.m. - 8 p.m.		9 a.m. - 8 p.m.
TaxAct Professional - TaxAct	9 a.m. - 10 p.m.	10 a.m. - 7 p.m.	9 a.m. - 6 p.m.
TaxSlayer Pro - TaxSlayer	9 a.m. - 9 p.m.	9 a.m. - 5 p.m.	9 a.m. - 5 p.m.
TaxWise - Wolters Kluwer	8 a.m. - 7 p.m.	10 a.m. - 6 p.m.	8 a.m. - 6 p.m.
UltraTax - Thomson Reuters	9 a.m. - 7 p.m.		

\*May extend hours during tax season. Please contact vendor for more information.



### Contact information & availability dates

	Expected month the 2023 package will be available	Phone	Website link
ATX - Wolters Kluwer		800-739-9998	<a href="https://TaxNA.wolterskluwer.com">TaxNA.wolterskluwer.com</a>
Drake Tax - Drake Software	December	828-524-2922	<a href="https://DrakeSoftware.com">DrakeSoftware.com</a>
Lacerte Tax - Intuit	November	844-877-9422	<a href="https://proconnect.intuit.com/lacerte/">proconnect.intuit.com/lacerte/</a>
ProConnect Tax - Intuit	November	844-877-9422	<a href="https://proconnect.intuit.com/tax-online/">proconnect.intuit.com/tax-online/</a>
ProSeries Tax Basic - Intuit	November	844-877-9422	<a href="https://proconnect.intuit.com/proseries/">proconnect.intuit.com/proseries/</a>
ProSeries Tax Professional - Intuit	November	844-877-9422	<a href="https://proconnect.intuit.com/proseries/">proconnect.intuit.com/proseries/</a>
TaxAct Professional - TaxAct	May	319-536-3571	<a href="https://taxact.com/professional/">taxact.com/professional/</a>
TaxSlayer Pro	November	706-619-2324	<a href="https://taxslayerpro.com">taxslayerpro.com</a>
TaxWise - Wolters Kluwer	November	800-739-9998	<a href="https://TaxNA.wolterskluwer.com">TaxNA.wolterskluwer.com</a>
UltraTax - Thomson Reuters		800-968-0600	<a href="https://tax.thomsonreuters.com">tax.thomsonreuters.com</a>

The survey was administered to a 50% random sample of NATP's members (n=10,744).  
A total of 1,214 members responded to the survey for an overall response rate of 11%.