

GREATAX™
Tax Preparation Made Easy

Great Tax 2007 Catalog



**Order Now and Save
see Early Buy Savings
Schedule inside**



TaxCalcUSA

Unbeatable Pricing ... Great Personalized Service

866-929-2252
www.TaxCalcUSA.com

2007

Great Tax Individual **\$390**

GREATAX™
Buy Early and Save up to 30%
Money Back Guarantee for 30 Days after it ships

This basic tax preparation package is ideal for small tax offices. Everything you need to process and E-File federal returns on one state is included you get all this for one incredibly low price.

Forms

- 1040, 1040-NR, 1040-V, 1040-ES and all supporting forms, schedules and instructions. Visit **www.GreatTax.com** for a complete listing.
- Forms, schedules and instructions for ONE state.
- Easily do other states & business returns on Pay-Per-Return basis.

Data Input

- Easy-to-use client input screens
- Quickly convert data from other tax programs
- ZIP Code database automatically populates city, state and county codes
- Employer library eliminates re-keying of data
- Data automatically links to all applicable forms and schedules
- Easy to use screen symbols indicate required and optional entries, and override options
- Save returns as PDF files to reduce paperwork
- Detailed depreciation worksheet
- Expanded dependent care grid
- Peek mode allows you to preview output

Data Management

- Seamlessly integrated e-filing and bank products with comprehensive online reporting
- Audit statements provide links to fields in need of correction
- Detailed invoicing, client management and reporting
- Editing tools to easily delete, insert or erase rows of data

Great Tax Individual Plus **\$745**

Includes all the features of the Great Tax Individual package, plus processing of federal and state returns for ALL accepting states.

- Process multiple state returns for individual taxpayers
- Easily process part year and Non-resident returns

Operations

- Easily add, delete, update, copy and rebuild client information
- Prior Year Updates for preparer data, employer library and E-Filing
- Print forms on laser or inkjet printers
- Integrated E-Filing and bank products for efficient, error-free processing
- Ability to customize and print return sets

Information Review

- At-a-glance review of return status
- Summary pane displays real-time calculations with form summary
- Quickly review all forms and schedules before printing and filing

Settings

- Choose your own background and text colors
- Invoice printing options

Technical Assistance

- Knowledgeable and friendly technical support representatives located in the U.S.A.
- Convenient Extended support hours during the tax preparation season.
- Easy links to IRS publications and line by line links to instructions
- Convenient online updates

For Maximum Savings...

Consider adding Unlimited Free E-Filing to your Great Tax Individual package

Software Conversions

Quickly convert data from other tax programs. Free access to Great Tax conversion programs, as they are released online, is available through this demo. Visit **www.GreatTax.com** for a list of available conversions.



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Great Tax Professional \$1045

Includes federal and all state individual returns plus many professional features that make client management easy

Forms

- 1040, 1040-NR, 1040-V, 1040-ES and all supporting forms, schedules and instructions. Visit www.GreatTax.com for a complete listing.
- Forms, schedules and instructions for ALL states.
- Easily do business returns on Pay-Per-Return basis.

Data Input

- Easy-to-use client input screens
- Quickly convert data from other tax programs
- ZIP Code database automatically populates city, state, county and many school district codes
- Employer library eliminates re-keying of data
- Data automatically links to all applicable forms and schedules
- Easy to use screen symbols indicate required and optional entries, and override options
- Save returns as PDF files to reduce paperwork
- Detailed depreciation worksheet
- Expanded dependent care grid
- Peek mode allows you to preview output
- Process multiple state returns for individuals
- 2 year return comparison
- Auto-fill libraries populate repetitive entries
- Create notes to print with the return and carry from the previous year

Data Management

- Seamlessly integrated e-filing and bank products with comprehensive reporting & file management
- Audit statements provide links to fields in need of correction
- Detailed invoicing, client management and reporting
- Editing tools to easily delete, insert or erase rows of data
- Comprehensive organizers
- Client labels, cover sheets, address book records and custom letters
- Extensive reporting includes production summary client summary, detail and status reports
- Depreciation reports and worksheets
- Blank Forms Library

Operations

- Easily add, delete, update, copy and rebuild client information
- Prior Year Updates for preparer data, employer library and E-Filing
- Print forms on laser or inkjet printers
- Integrated E-Filing and bank products for efficient, error-free processing
- **FREE network functionality with customizable user settings**
- Refund calculator for quick reference during processing
- Enhanced client tracking options and updates
- Duplex printing

Information Review

- At-a-glance review of return status
- Summary pane displays real-time calculations with form summary
- Quickly review all forms and schedules before printing and filing
- Comprehensive online E-Filing and RAL reports

Settings

- Choose your own background and text colors
- Customize reports and invoices
- Custom letter templates
- Custom forms tab for quick start-up
- Changeable user security settings

Technical Assistance

- Knowledgeable and friendly technical support representatives located in the U.S.A.
- Convenient Extended support hours during the tax preparation season.
- Easy links to IRS publications and line by line links to instructions
- Convenient online updates
- Communications testing for E-Filing and banking

Great Tax Silver \$1865

Includes all of the features listed with the Great Tax Professional Package plus:

- Unlimited FREE State and Federal E-Filing
- Includes banking products participation
- Opportunity to earn cash with Great Rewards

Great Tax Professional Plus \$1445

Complete individual and business tax preparation
Includes federal and all state individual returns plus
major business returns, E-Filing functions and many
time saving professional features.

Forms

- 1040, 1040-NR, 1040-V, 1040-ES and all supporting forms, schedules and instructions.
- Multi-state processing for business and individual forms.

PLUS...

1041 Forms and Schedules

- Calculates Grantor Trust letters
- Generates Schedule K-1 transmittal letters and includes pass-through entities
- Calculates fiduciary accounting income
- Income distribution deduction calculations
- Split interest trust returns

1065 Forms and Schedules

- E-Filing for 1065 returns
- Computes partnership percentage for change in ownership
- Basis worksheets
- Includes carry-forward disallowed losses
- Rental income and expense worksheets
- Schedule K and K-1 pass-through entities and transmittal letters
- Book and tax differences carry to schedule M-1

1120 Forms and Schedules

- E-Filing for 1120 and 1120S returns
- 1120-H and 1120-A forms included
- Carry forward information for subsequent tax years
- Schedule K-1 Pass-through entities
- Amended return processing and filing
- Book and tax differences carry to Schedule M-1

1120S Form and Schedules

- Computes shareholder percentage for change in ownership
- Basis worksheets and retained earnings reconciliation
- Supports capital gains tax and excess net passive income tax
- Generates taxable income amounts
- Schedule K and K-1 pass-through entities and transmittal letters
- Schedule M-1 and M-2

Great Tax Professional Plus has all of the features of the Professional package, plus many additional features including:

Data Management

- Preformatted letters and other professional correspondence
- Custom sorting options by form, return type and other criteria

Operations

- 1065, 1120 and 1120S E-Filing
- Data back-up options
- Blank forms library
- Suppress or select error-checking functions

Early Buy Savings Schedule

Purchase Great Tax from TaxCalcUSA early and you can take the following discounts off the list price of any Great Tax software package:

- **30% off** until 9/28/2007
- **25% off** until 10/19/2007
- **20% off** until 12/21/2007

Don't Delay, Call Us Today!

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Great Tax Tax Planner \$195

Great Tax Tax Planner is an easy to use "what if" tool for accountants, attorneys and tax practitioners.

- Compare up to five different tax scenarios on screen at one time
- Easily added to any Great Tax package
- A tremendous value that easily pays for itself

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Great Tax Professional Premium \$1745

Complete individual and business tax preparation
Includes individual federal and all state returns plus, all
business returns, E-Filing and many time saving
professional features!

Forms

- 1040, 1040-NR, 1040-V, 1040-ES and all supporting forms, schedules and instructions.
- 1041, 1065 1120, 1120S and all supporting forms and schedules (see Plus Package for details).
- 706, 709, 990 and 5500 series forms
- Forms and schedules fro ALL states
- Visit www.GreatTax.com for a complete listing.

706 Estate Forms and Schedules

- Automatically deducts 50% for community property
- All forms and schedules included

709 Gift Tax Forms and Schedules

- Generates spouses return for community property with gift splitting
- Automatically deducts 50% for community property
- GST exemption and allocation
- Marital and foreign spouse computations
- Charitable deductions
- 5-year proration
- Donation summary

990 Exempt Forms and Schedules

- Generates 990, 990-A, 990-EZ and 990-PF forms, schedules and instructions

5500 Benefit Plan Forms and Schedules

- Generates 5500 and 5500-EZ forms, schedules and instructions.

Note: 5500, 706 and 709 series of forms cannot be filed with this demo software.

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- **20% off** until 12/21/2007

Great Values

Great Tax Gold \$2275

Complete individual and major business tax preparation plus unlimited E-Filing and Bank Products for one low price! Federal and state individual and major business preparation bundled with bank products and unlimited E-Filing for federal and state individual and business returns.

Individual and Business Tax Preparation

- Great Tax Gold includes all features listed with the Professional Plus package, including individual and major business returns for federal and states.
- Individual federal and all states E-Filing
- No additional E-Filing transmission fees
- 1065, 1120 and 1120S E-Filing
- Includes Bank Products Participation
- Earn cash with the Great Rewards program

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Great Tax Platinum \$2560

Great Tax Platinum is the ultimate in professional tax preparation software. It includes all the options listed with the Great Tax Gold package, including unlimited E-Filing, for federal and state individual and business returns.

Plus

Also includes 706, 709, 990 and 5500 series forms.

Great Tax Tax Planner \$195

Great Tax Tax Planner is an easy to use "what if" tool for accountants, attorneys and tax practitioners.

- Compare up to five different tax scenarios on screen at one time
- Easily added to any Great Tax package
- A tremendous value that easily pays for itself



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E-File is in Demand

E-File is the fastest, most efficient way to file, and more taxpayers are demanding it each year. Great Tax E-Filing is a proven, reliable resource for fast, error-free processing.

Great Tax E-Filing is seamlessly integrated

- Completely integrated third-party E-Filing features save you time and money.
- E-Filing for federal individual and state returns for all available states
- E-Filing available for 1065, 1120 and 1120S
- Low transmission fees – no fee option avail.
- Thousands of error checks means fewer rejected returns
- Locate incorrect fields with the click of the mouse
- Online E-Filing accelerates transmission time
- Federal and State acknowledgement reports, confirmation letters and summary reports
- Online updates
- Easily add RALs and other bank products

Great Tax E-File Center

The online E-File Center feature of the Great Tax software gives you the ability to process and monitor your electronically filed returns and bank products with a click of a button. The E-File Center includes:

- Real time return acknowledgement and check print information
- Alerts feature for important software and industry news
- Important links to state and other industry websites
- Access to the E-File Center is available via the Great Tax software or Great Tax Website

Low E-Filing Fees

Integrated E-Filing software is included with your Great Tax software and has these transmission fees:

- **Federal Individual Returns** **\$ 6**
- **State Individual Returns** **\$ 4**
- **Federal & State Business Returns** **\$10**

Silver, Gold and Platinum packages include Unlimited Free E-Filing. Free E-Filing can also be added to any package for \$205 State and \$405 Federal.



Buy Early and Save up to 30%

Money Back Guarantee for 30 Days after it ships

Bank Products

- Get your fees deposited directly to your bank account – no upfront fees for your clients
- Earn additional revenue
- Enhance your services offered to clients
- Offer loan and non-loan products.
- Reliable products from trusted banking leaders

Refund Anticipation Loans (RALs)

- Loan products are perfect for clients who need their refund proceeds quickly
- Funds are delivered to your client via check or direct deposit usually within 24 of the return being accepted by the IRS
- Your fees are deposited directly into your bank

Non-Loan Bank Products

- No upfront fees required from your clients
- Your fees are deposited directly into your bank
- Funds are delivered to your client via check or direct deposit after the IRS deposits the refund at the bank (usually 8-15 days after the return is accepted by the IRS)
- Check option for those who want the speed of direct deposit but don't have a bank account
- State refunds can also be processed as non-loan bank products

Participation in Bank Products is Easy

- Pay \$105 participation fee, or purchase Great Tax Silver, Gold or Platinum package, all of which include participation for FREE
- Select your bank and complete an enrollment form right in the Great Tax Software
- Complete your agreement and order supplies from your bank
- You are ready to provide Outstanding Service!
- Note: a \$6 Great Tax network fee is deducted directly from your client's refund proceeds in addition to the bank fee.
- You could earn a REWARD of up to \$3 per bank product return at the end of the season



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Great Tax Quick Comparison Chart



2007 Great Tax Software Package	Federal	1 State	All States	Additional Professional Features	Business Forms 1120 / 1120S 1065 / 1041	Additional Business Forms 706/709/990/5500	Unlimited Federal E-Filing	Unlimited State E-Filing	Unlimited Business E-Filing	Bank Products Participation	Networking
Individual \$ 390	Yes	Included	Pay per Return		Pay per Return	Pay per Return	Optional	Optional	Optional	Optional	
Individual Plus \$ 745	Yes		Included		Pay per Return	Pay per Return	Optional	Optional	Optional	Optional	
Professional \$ 1045	Yes		Included	Yes	Pay per Return	Pay per Return	Optional	Optional	Optional	Optional	Included
Professional Plus \$ 1435	Yes		Included	Yes	Included	Pay per Return	Optional	Optional	Optional	Optional	Included
Professional Premium \$ 1745	Yes		Included	Yes	Included	Included	Optional	Optional	Optional	Optional	Included
Silver \$ 1865	Yes		Included	Yes	Pay per Return	Pay per Return	Included	Included	Optional	Included	Included
Gold \$ 2275	Yes		Included	Yes	Included	Pay per Return	Included	Included	Included	Included	Included
Platinum \$ 2560	Yes		Included	Yes	Included	Included	Included	Included	Included	Included	Included

Pay-Per-Return Options

Perfect for out-of-state and business returns!

Pay-Per-Return processing lets you add any return to any Great Tax Package.

You get all the forms needed to prepare a return for one client, including supporting schedules and instructions, without having to purchase a complete package.

- \$30 per business return
- \$15 per individual return, including forms for federal and one state
- \$10 per each additional state

Pay-Per-Return codes and necessary updates are provided online. You must provide a credit card during setup that will be charged periodically for these fees.

E-Filing

E-Filing is integrated into every Great Tax Package!

- Processing fee of only \$6 per Federal Return
- Processing fee of only \$4 per State Return
- Business Federal and State Returns \$10

Unlimited E-Filing

Ideal if you E-File more than 60 Returns!

Unlimited E-Filing can be added to any Great Tax package (it is included in the 3 "metal" packages).

- The cost is just \$ 405 for Unlimited Federal E-Filing
- The cost is just \$ 205 for Unlimited State E-Filing
- Unlimited E-Filing is not eligible for "Early Buy" discounts

Bank Products Participation

- Bank Products allow you to have your fees deposited directly into you Bank account
- Earn additional revenue and Great Rewards rebates
- Enhance the service you offer your clients and gain a competitive edge
- Participation cost only a one time fee of \$105 (not eligible for "Early Buy" discounts)
- Included for free in the "Metal" packages

Early Buy Savings

Purchase Great Tax from TaxCalcUSA early and you can take the following discounts off the price of any Great Tax package:

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- **25% off** until 10/19/2007
- **20% off** until 12/21/2007



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