

NATP™ 2021 Software Survey Results

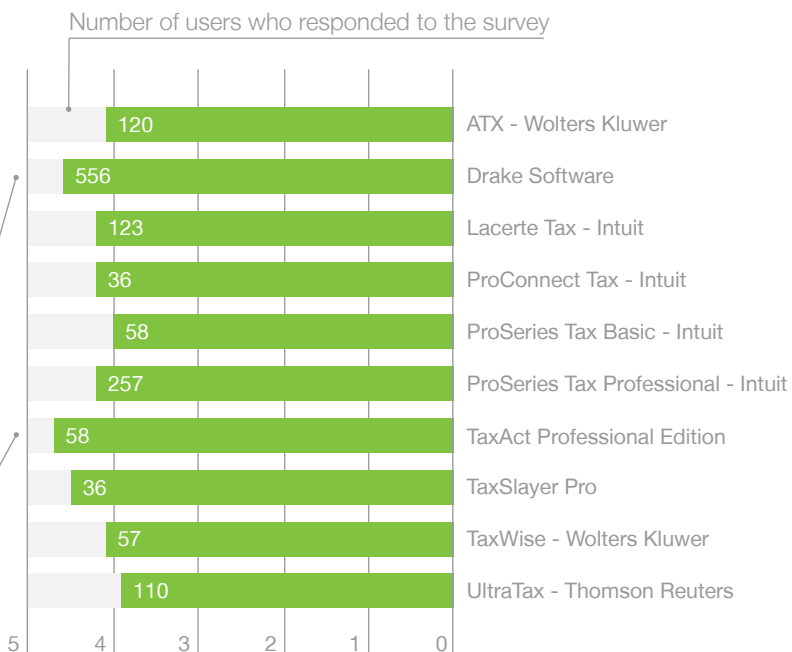


Overall Satisfaction

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

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

4.7



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

ATX - Wolters Kluwer	Reliability
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 Edition	Ease of use
TaxSlayer Pro	Customer support
TaxWise - Wolters Kluwer	Reliability
Ultra Tax - Thomson Reuters	Reliability



41% indicated reliability as the most important factor when selecting software.

Compatibility/Reliability

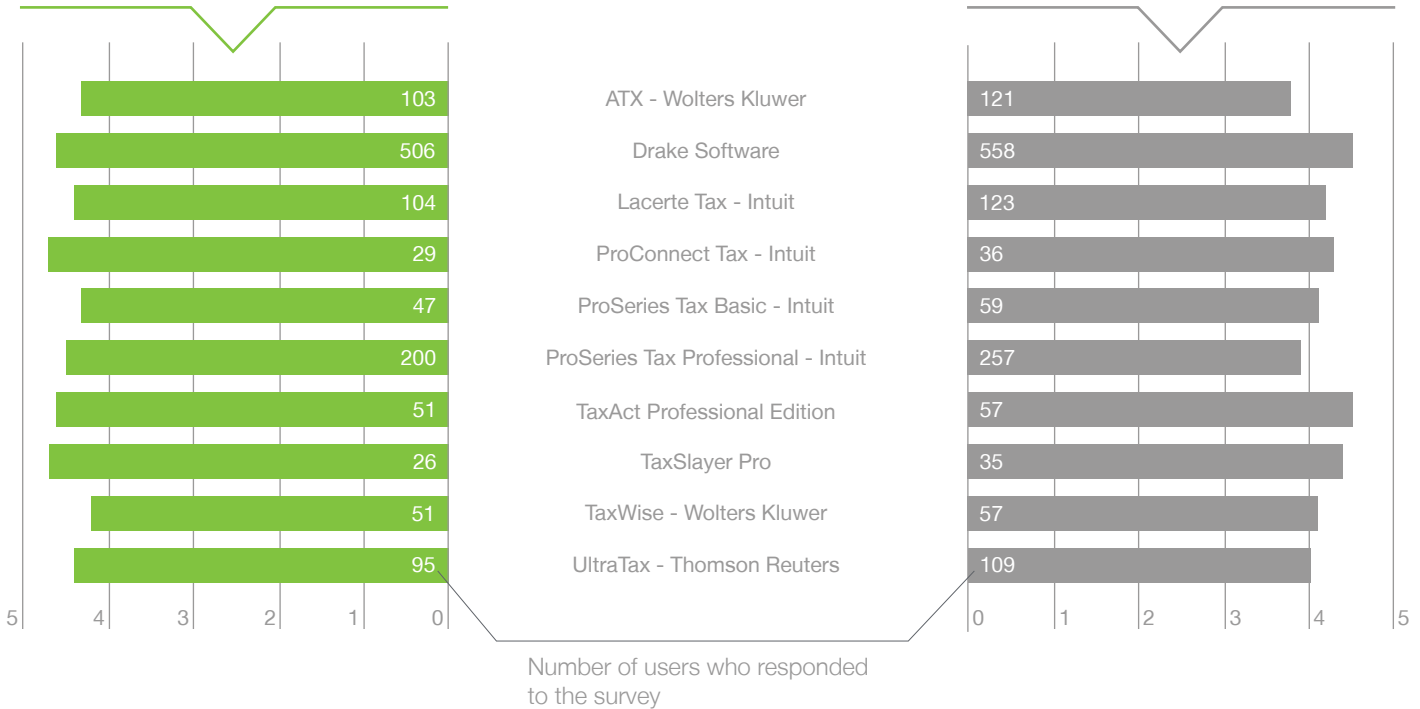
Respondents were asked to rate their satisfaction on a scale of 1-5 with 1 being very dissatisfied and 5 being very satisfied.



Software compatibility with your network



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



Software Details

	Offers a package available to convert data from other vendors' 1040 software	Offers cloud-based (online) preparation	Desktop-based software offers a mobile app option	Form-based (navigating forms by direct clicks within form)	Interview-based (pre-determined questions to identify necessary forms)	Input sheet (navigating by subject/topic)	Other input format
ATX - Wolters Kluwer	✓			✓	✓		
Drake Software	✓	✓		✓	✓	✓	
Lacerte Tax - Intuit	✓	✓				✓	
ProConnect Tax - Intuit	✓	✓				✓	
ProSeries Tax Basic - Intuit	✓			✓		✓	
ProSeries Tax Professional - Intuit	✓	✓		✓		✓	
TaxSlayer Pro	✓	✓	✓				Hybrid form and menu-driven input sheet
TaxWise - Wolters Kluwer	✓	✓	✓	✓	✓	✓	
Ultra Tax CS - Thomson Reuters	✓	✓		✓	✓	✓	

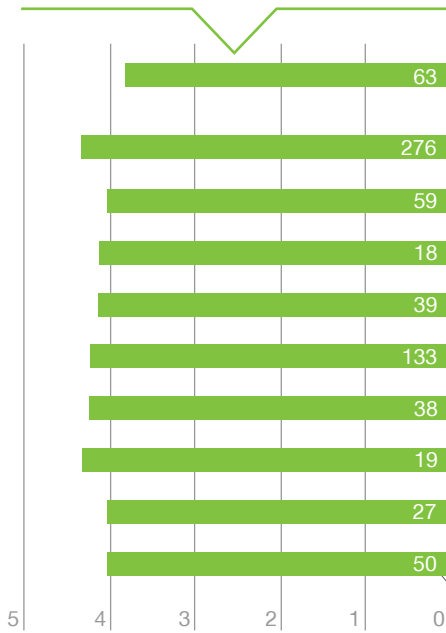
Please check the company's website or call for more information

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.



Software conversion package



Reasonable price



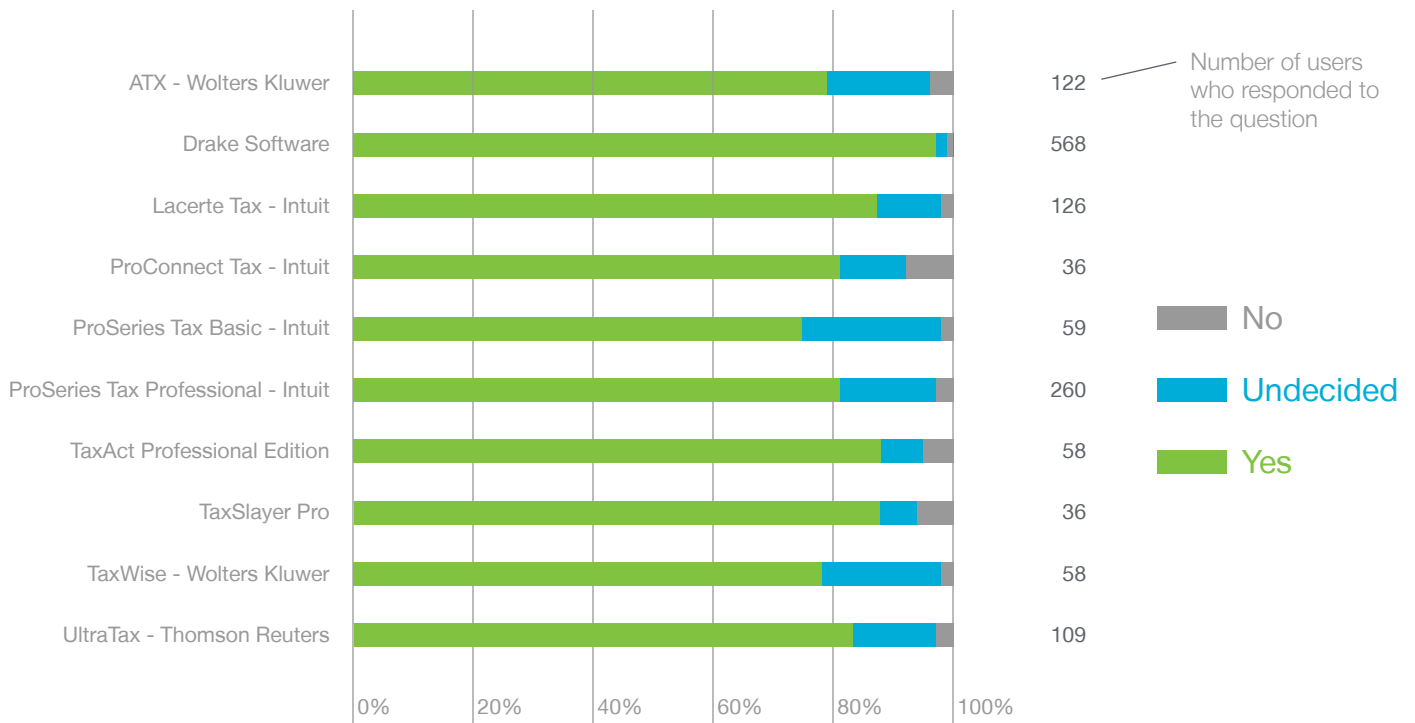
Number of users who responded to the survey

Pricing

	2020 1040 package		2020 state package		2020 business package	
	Price	Renewal price	Price	Renewal price	Price	Renewal price
ATX - Wolters Kluwer	\$799	\$839	Included	Included	\$1,789-\$4,485	\$1,929-\$4,699
Drake Software	\$1,225-\$1,625	\$1,225-\$1,625	Included	Included	Included	Included
TaxSlayer Pro	\$1,195	\$995	Included	Included	Included	Included
TaxWise - Wolters Kluwer	\$1,299	\$1,299	Included		\$2,740	\$2,740
Ultra Tax - Thomson Reuters	\$3,760	\$3,760	\$430-\$765	\$430-\$765	\$2,085-\$2,695	\$2,085-\$2,695

Software packages not listed use bundle or special pricing. Please check the company's website or call for more information.

Retention: Do you plan to use the same software next tax season?



Usability

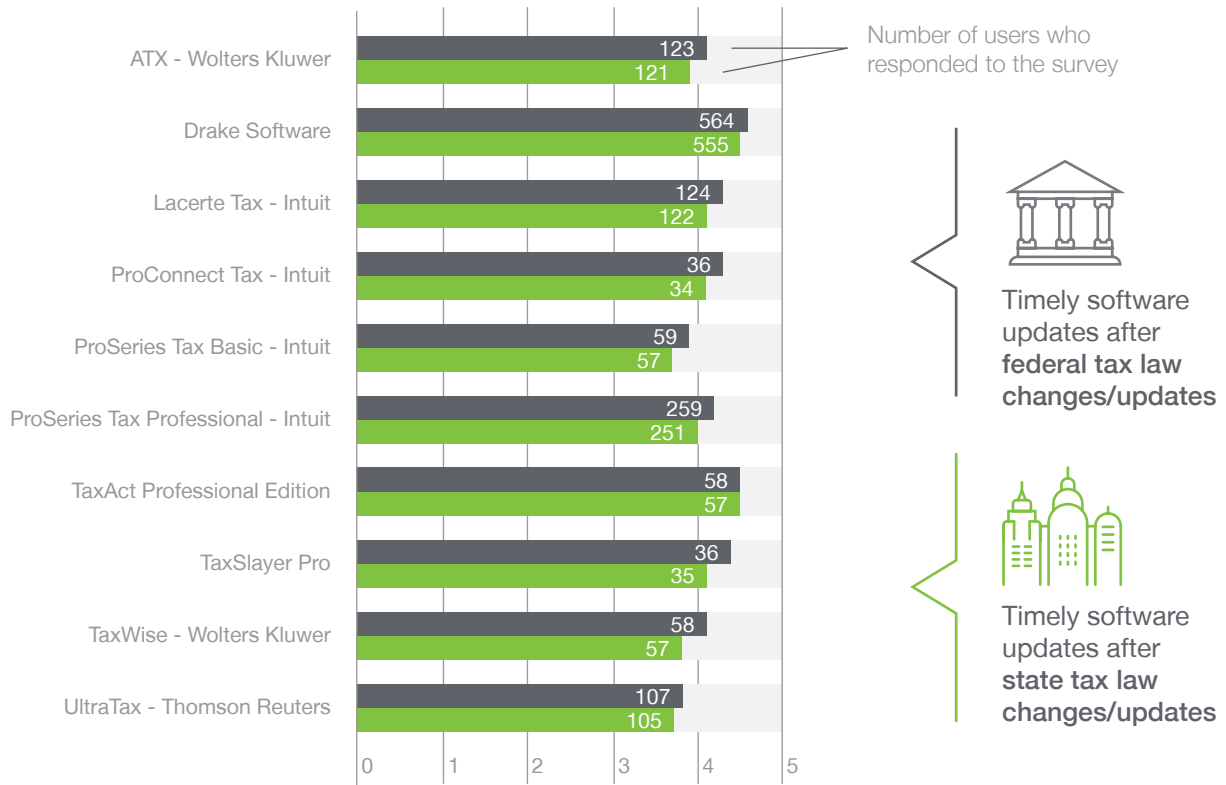
Respondents were asked to rate their satisfaction on a scale of 1-5 with 1 being very dissatisfied and 5 being very satisfied.

	Ease of software installation	Ease of learning software	Ease of working with software	Ease of reviewing the tax return within software	Ease of e-filing
ATX - Wolters Kluwer	4.4 / 119	4.3 / 122	4.3 / 123	4.4 / 122	4.5 / 121
Drake Software	4.6 / 555	4.4 / 556	4.4 / 565	4.5 / 562	4.7 / 559
Lacerte Tax - Intuit	4.5 / 122	4.3 / 123	4.4 / 124	4.6 / 125	4.7 / 123
ProConnect Tax - Intuit	4.6 / 25	3.9 / 35	4.0 / 35	4.3 / 35	4.7 / 36
ProSeries Tax Basic - Intuit	4.4 / 59	4.2 / 60	4.3 / 60	4.3 / 60	4.4 / 56
ProSeries Tax Professional - Intuit	4.6 / 254	4.4 / 253	4.4 / 258	4.5 / 257	4.6 / 253
TaxAct Professional Edition	4.8 / 58	4.8 / 58	4.6 / 58	4.6 / 58	4.8 / 56
TaxSlayer Pro	4.8 / 35	4.6 / 35	4.6 / 36	4.5 / 36	4.8 / 35
TaxWise - Wolters Kluwer	4.3 / 56	4.4 / 58	4.3 / 57	4.5 / 59	4.5 / 57
Ultra Tax - Thomson Reuters	4.3 / 94	3.9 / 108	4.3 / 109	4.5 / 108	4.6 / 108

Satisfaction number / number of responses

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.



Is the 1099-series included in the price of the basic 1040 package?

	Yes
ATX - Wolters Kluwer	
Drake Software	✓
Lacerte Tax - Intuit	✓
ProConnect Tax - Intuit	✓
ProSeries Tax Basic - Intuit	✓
ProSeries Tax Professional - Intuit	✓
TaxSlayer Pro	
TaxWise - Wolters Kluwer	✓
Ultra Tax - Thomson Reuters	✓

For software not listed, please contact vendor for more information.

Support

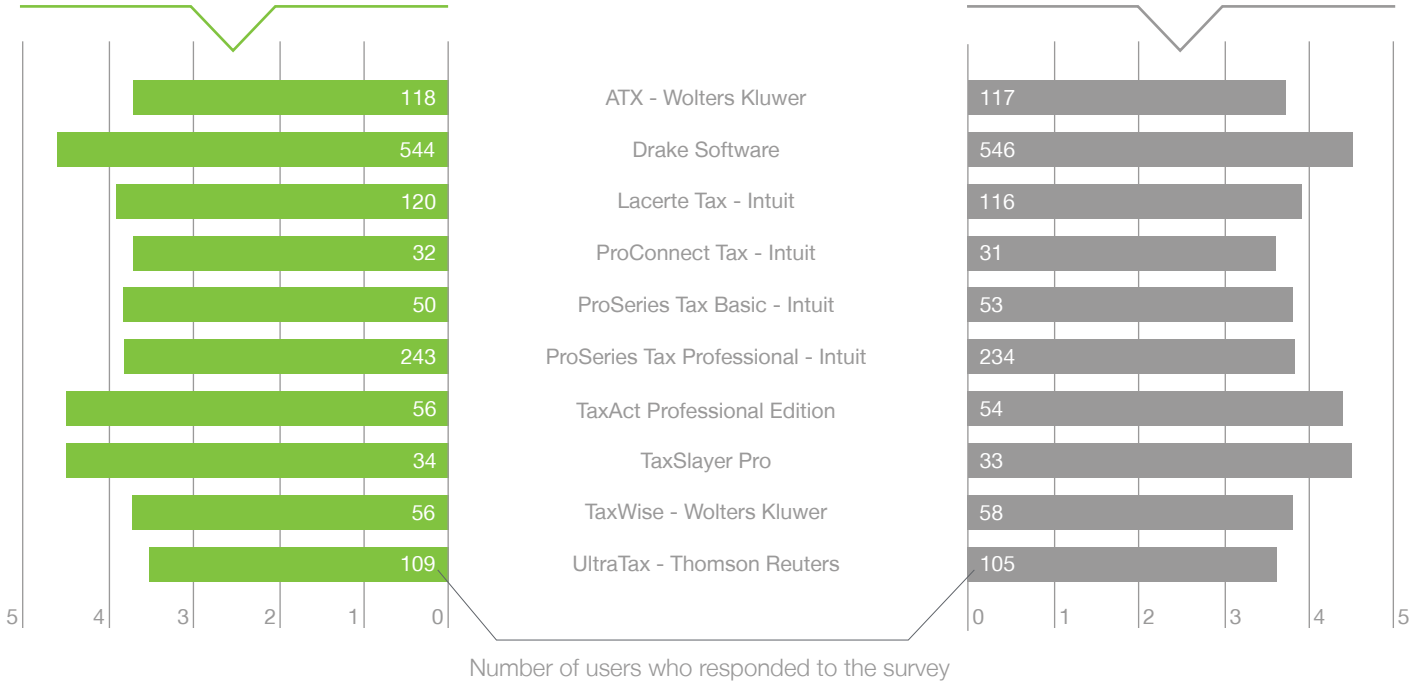
Respondents were asked to rate their satisfaction on a scale of 1-5 with 1 being very dissatisfied and 5 being very satisfied.



Customer service from software company



Technical support from software company



Accuracy

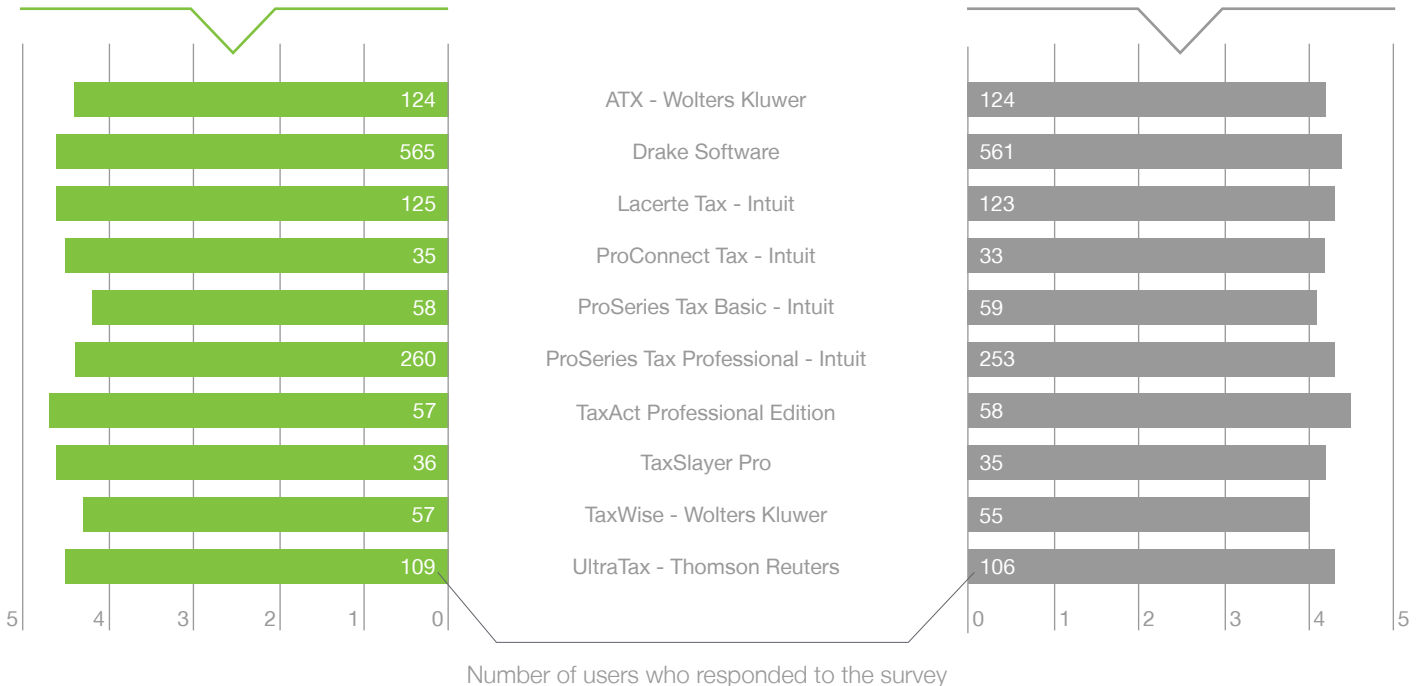
Respondents were asked to rate their satisfaction on a scale of 1-5 with 1 being very dissatisfied and 5 being very satisfied.



Accuracy of software in regards to federal tax law



Accuracy of software in regards to state law



Company Information



Customer service hours

	During tax season		Outside of tax season
	Monday-Friday	Saturday	Monday-Friday
ATX - Wolters Kluwer	8 a.m. - 7 p.m. EST	9 a.m. - 6 p.m. EST	8 a.m. - 6 p.m. EST
Drake Software	8 a.m. - 10 p.m. EST	8 a.m. - 6 p.m. EST	8 a.m. - 9 p.m. EST
Lacerte Tax - Intuit	9 a.m. - 9 p.m. EST	11 a.m. - 5 p.m. EST	9 a.m. - 8 p.m. EST
ProConnect Tax - Intuit	9 a.m. - 9 p.m. EST	11 a.m. - 7 p.m. EST	9 a.m. - 8 p.m. EST
ProSeries Tax Basic - Intuit	9 a.m. - 9 p.m. EST	11 a.m. - 7 p.m. EST	9 a.m. - 8 p.m. EST
ProSeries Tax Professional - Intuit	9 a.m. - 9 p.m. EST	11 a.m. - 7 p.m. EST	9 a.m. - 8 p.m. EST
TaxSlayer Pro	8 a.m. - 9 p.m. EST		8 a.m. - 5 p.m. EST
TaxWise - Wolters Kluwer	8 a.m. - 7 p.m. EST	9 a.m. - 6 p.m. EST	8 a.m. - 6 p.m. EST
UltraTax - Thomson Reuters	8 a.m. - 10 p.m. EST		9 a.m. - 8 p.m. EST

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



Contact information & availability dates

	2021 package	Phone	Website link
ATX - Wolters Kluwer	Nov. 23	800-375-9542	TaxNA.wolterskluwer.com
Drake Software	Nov. 29	866-670-8474	DrakeSoftware.com
Lacerte Tax - Intuit	November	844-877-9422	https://proconnect.intuit.com/lacerte/
ProConnect Tax - Intuit	November	844-877-9422	https://proconnect.intuit.com/tax-online/
ProSeries Tax Basic - Intuit	November	844-877-9422	https://proconnect.intuit.com/proseries/
ProSeries Tax Professional - Intuit	November	844-877-9422	https://proconnect.intuit.com/proseries/
TaxSlayer Pro	Nov. 8	888-420-1040	www.taxslayerpro.com
TaxWise - Wolters Kluwer	November	800-375-9542	TaxNA.wolterskluwer.com
UltraTax - Thomson Reuters	November	847-903-4219	tax.thomsonreuters.com

The survey was administered to a 50% random sample of NATP's members (n = 11,327). A total of 1,580 members responded to the survey for an overall response rate of 13.9%.