



OLTPRO
Professional Tax Software

1-877-OLT-4PRO

WWW.OLTPRO.COM

GET THE **POWER** OF PRO[®]

BENEFITS

- Easy to use
- Direct input or interview input
- Complete web based software
- Desktop software (CD)
- Bank products
- Client Portal
- Free e-filing
- Free customer support
- Multi-user office access
- Mobile app with remote signature



SUPPORTED FORMS

1040, 1040NR, 1041, 1065, 1120, 1120S, 2290, 5500, 8849, 720, 706, 709, 990, All states.

BANK PRODUCTS

Increase revenue by offering the convenience of bank products! Bank products allow taxpayers to have their preparer fees deducted from their federal tax refund. We partner with several banks to offer you the best products and pricing in the industry.

Client Manager

Complete access manager to quickly and easily locate all taxpayer information saving you valuable time. Select the search criteria to customize the available information.

- Personal details
- Return details
- Payment details
- History details
- Preparer notes
- Return status
- Schedule appointments
- Letters
- Export to excel

E-File Manager

Complete tracking system allows you to keep the most current status information during every stage of the e-file process.

View client lists for:

- All queued
- All transmitted
- All accepted
- All rejected

EIN and Zip Code Database

We understand how valuable your time is. These time saving auto-fill features will increase speed and accuracy to help run your tax office more efficiently!

- EIN database stores employer identification numbers automatically upon entry.
- Ability to customize your database anytime with an automatic add/delete option.
- Zip code database allows quick entry of address information by auto-filling the city and state based on the zip code entered.

Multi-User Manager

Ability to add additional users to your office with tools to help customize and optimize your business.

- Each user has a unique account name and password.
- Set privileges specific to each user; such as e-file, bank, check printing, and reports.
- Disable account access at anytime.
- Enable an IP address feature for security you control.

Prior Year Import

Seamlessly pull forward all existing client information from the prior year.

- Choose between a standard or comprehensive rollover.
- Depreciation is carried forward from year to year.
- Save significant data entry time.

Reports

Run your office more effectively by generating valuable reports throughout the tax season. With over 50 standard reports to choose from, you can customize them specifically to meet your needs!

- Status and tracking
- Revenue
- Yearly growth comparison
- Income
- e-file
- Bank

Document Manager

Reduce or eliminate paper trail by scanning and uploading essential client documents.

- Create an electronic file for your clients.
- Upload important documents such as W-2s, 1099s, and receipts directly into a client's electronic file.
- Immediate access to your clients' information for a more effective and efficient filing option.
- Ability to e-mail important documents to clients when they need them.

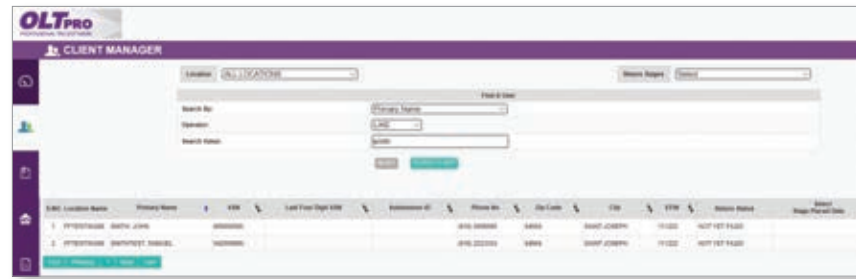
MULTI-OFFICE MANAGER

Multi-Office Management Software

- Monitor all remote locations
- Manage productivity
- Run real time reports for all locations or individual locations
- Create business templates to apply to locations for easy setup
- Ability to review taxpayer returns for all locations
- Increase revenue with value added products



Quick access to all taxpayers at any location!



The Dashboard allows a quick glance of overall productivity!



MY TAX OFFICE-Virtual

My Tax Office Virtual offers both an online client portal and mobile app that allows taxpayers to stay connected with their tax preparer without visiting the office!

My Tax Office Virtual is a great tool for tax preparers to manage their clients anytime, anywhere!

Benefits

- Increase efficiency, productivity, revenue
- Stay connected to your client
- Easy to use



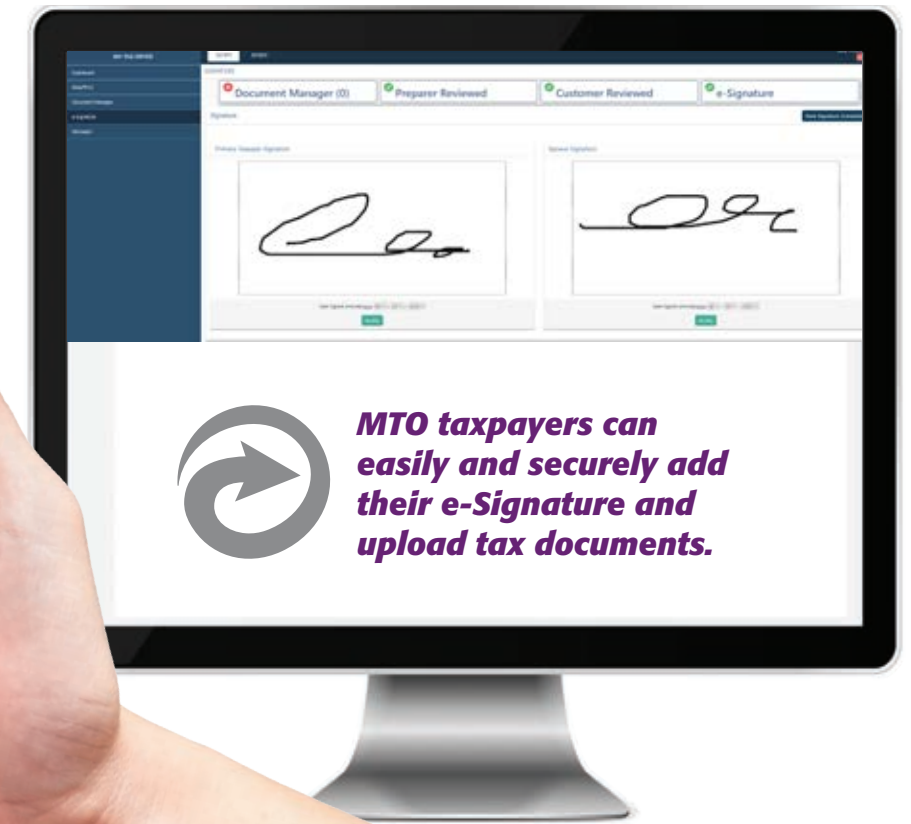
Once the taxpayer creates the MTO account it's automatically integrated to their tax office!

Features

- Upload documents
- Remote signature
- Review tax documents
- Real time return status information
- Send real time messages



Manage MTO taxpayers from OLTPRO software!



MTO taxpayers can easily and securely add their e-Signature and upload tax documents.

OLTPRO DESKTOP-Unlimited Returns, Free e-Filing

OLTPRO Desktop offers downloadable preparer software that is ideal for the single preparer office or multi-user access. Network capabilities included!

Includes at NO additional cost:

- Individual 1040, 1040NR
- All business states
- Multi-user setup
- All states + DC (that require tax filing)
- Direct input or interview input
- Document manager
- Business Federal
- Free e-filing
- Mobile app
- 1120, 1120S, 1065, 1041, 2290,
- Bank products
- Free customer support
- 5500, 990, 706, 709, & 720



Direct Input

This feature will give you the flexibility and speed to enter client information directly as it will appear on the tax form. Select the forms you need, when you need them, to successfully complete and file your clients' tax returns!



OLTPRO WEB-Unlimited Returns, Free e-Filing

OLTPRO gives you completely web-based software that is user friendly; yet provides comprehensive software for any tax office. If you are a preparer on the go or just need tax software that is maintenance free with nothing to download, this product is for you! Create a multi-user office without the hassle or costs of a server, and start growing your business today!

Includes at NO additional cost:

- Individual 1040, 1040NR
- All states + DC (that require tax filing)
- Business Federal
- 1120, 1120S, 1065,
- 1041, 2290, 5500, 990,
- 706, 709, & 720
- All business states
- Direct input or interview input
- Free e-filing
- Bank products
- Multi-user setup
- Document manager
- Client Portal
- Mobile app
- Free customer support



Advantages

Get your office up and running with no delays and minimal setup.

- No waiting for software, start preparing returns right away
- Ease-of-use
- Maintenance free with nothing to download
- All updates are automatically done at each login
- Create a multi-user office with locations anywhere
- Immediate access to your client's information anytime, anywhere
- Free customer support
- IP security setup

MAXIMIZE YOUR BOTTOM LINE

OLTPRO is designed to Maximize Your Bottom Line by offering an efficient, affordable, and reliable professional tax software for any type of tax office. We offer comprehensive, user-friendly tax software for CPAs and Tax Professionals that is sure to increase revenue and efficiency to help grow your tax business! With low, competitive pricing in addition to free e-filing software, **OLTPRO** will save you hundreds of dollars instantly.

	WEB-BASED \$499	DESKTOP (CD) \$599
Unlimited 1040, 1040NR	✓	✓
Unlimited Business 1041, 1065, 1120, 1120S, 2290, 5500, 720, 706, 709, 990, 8849	✓	✓
All States (Individual & Business)	✓	✓
Unlimited Free e-Filing (Individual & Business)	✓	✓
Free Support	✓	✓
Multi-user Access	✓	✓
Client Manager	✓	✓
Document Manager	✓	✓
Client Organizer	✓	✓
Bank Software	✓	✓
Direct Input	✓	✓
Interview Input	✓	✓
Mobile App / Client Portal	✓	✓
Integrated Software	✓	✓
Multi-Office Manager	✓	✓
Network Capabilities		✓
Auto Backup Feature		✓
Customized Color Schemes		✓

System Requirements

Computer: IBM or compatible Intel Core i3 (2.0GHz and above)

Operating System: Windows 10

Memory: Minimum 8GB of RAM

Monitor: Supports SVGA color monitors (high-color 16 bit) 1024x768 screen resolution recommended.

CD ROM Drive: 4X CD-ROM or DVD R/W

Internet Connection: Broadband modem or direct Internet connection required to obtain updates, complete electronic filing, or access customer service.

Third Party Software: Microsoft Internet Explorer 9.0 (or higher), Mozilla Firefox 10.0 (or higher), Adobe Acrobat 9.5 (or higher).

Printer: Works with any windows compatible inkjet or laser printer with 1 MB of memory or more.

Security

OLTPRO offers several security options to protect your clients' sensitive tax data.

- Two Factor authentication-SMS text message or email code.
- Security question setup-user defined.
- Email tax forms securely to your clients. Data is encrypted and forms are password protected.
- Google Authenticator



CUSTOMER SUPPORT

We pride ourselves on offering fast and dependable customer and technical support!



ELECTRONIC FILING

e-filing through OLTPRO is user-friendly, dependable, reliable, and always FREE!



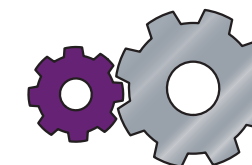
WEB-BASED



DESKTOP



MULTI-OFFICE MANAGER



INTEGRATED SOLUTIONS



VIRTUAL TAX OFFICE

GET THE
POWER
OF PRO[®]

The OLT Logo, OLTPRO, and OLT are Trademarks of On-Line Taxes, Inc.



OLTPRO
Professional Tax Software

www.oltpro.com

Toll Free Sales Department **1-877-OLT-4PRO** (1-877-658-4776)